INSIGNIA LIBRARY SYSTEM

USER MANUAL

VERSION 6.4

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Welcome

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Welcome

Welcome to Insignia Software Corporation. Thank you for choosing Insignia Library System for your library.

At Insignia Software we strive to exceed the expectations of our customers. We are responsive to our customers' needs and endeavor to provide most innovative features in Insignia Library System. Customer satisfaction is what we aim for at Insignia. We shall continue to provide integrated and cost effective solutions to our customers through innovation.

Your complete satisfaction is important to us and we value comments and feedback. Please provide us feedback from menu **Help > Feedback**. If you are not very satisfied with our tech support, please send email to Insignia Technical Support Manager @ itsmanager@insigniasoftware.com. You can also search our knowledgebase from http://www.insigniasoftware.com and click on the link Knowledgebase.

Thank you again for choosing Insignia Library System.

Starting Insignia Library System

1. Open an internet browser such as IE, Firefox, or Safari.
2. Enter the URL for library server in the address bar.
   2.1. For cataloging and circulation the URL format is: http://servername/ils
   2.2. For cataloging and circulation the secure URL format is: https://servername/ils
   2.3. For OPAC the URL format is: http://servername
3. Enter the login ID and password given to you.

For reference, please write down the connection information here.

Library URL: http://

Patron URL: http://

Acronyms

ILS: Insignia Library System
OPAC: Online Public Access Catalog
ILL: Interlibrary Loan
ITSM: Insignia Technical Support Team

Login Screen

Login interface provides the features listed below:
Remember Me: If selected saves the last login ID on the computer in the Login field.
Themes: Enables selection of a color scheme for the ILS to display in.
Online Meeting: Click it when prompted to start an online meeting with Insignia Technical Support.
OPAC: Links to the OPAC.

Navigation Bar, Quick Toolbar, Menu, Large and Small Icons

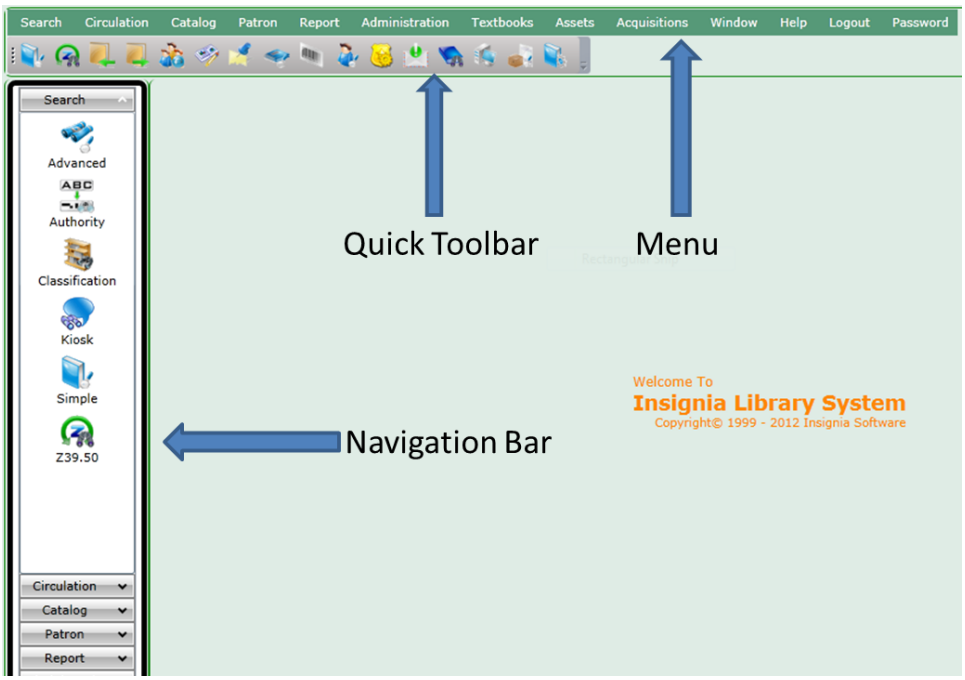
The **Navigation Bar**, **Quick Toolbar**, and **Menu** provide three ways to access modules and features in the ILS. The Navigation Bar is displayed vertically on the left of the screen as shown below. The Quick Toolbar is displayed horizontally directly below the Menu as shown below.

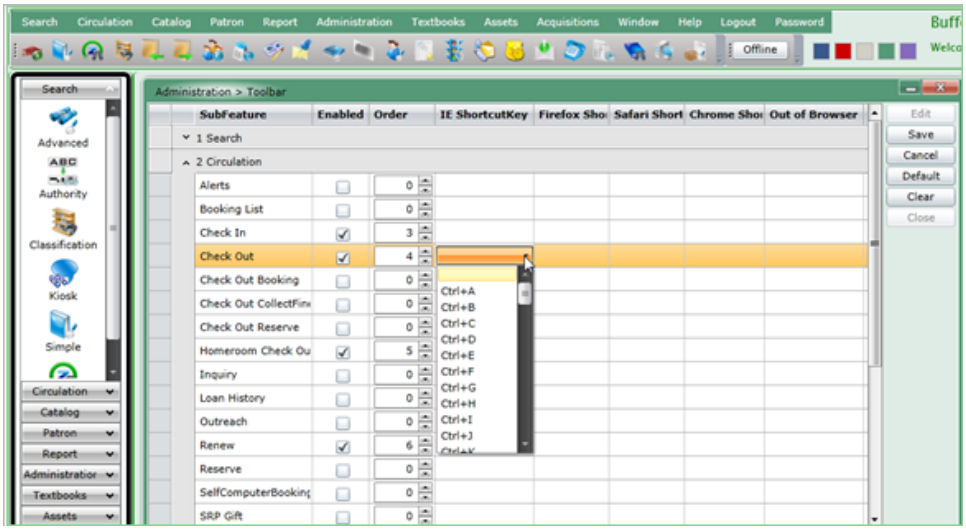
The Quick Toolbar and Navigation Bar can be hidden from the view by selecting Hide Vertical Bar and Hide Toolbar on the Login screen. Under the Help menu, selecting ”Large Icon” or “Small Icon” from the bottom of the list can change the sizing of the icons in both the navigation bar and quick toolbar.

Quick Toolbar Customization

The Quick Toolbar is the top horizontal bar listing icons. It can be customized to add quick links to features. This enables access to those features with a single mouse click. To add/remove icons in Quick Toolbar follow these steps:

1. Go to menu **Administration > Quick Toolbar**.
2. Click Edit.
3. Click to expand the category.
4. Select the feature to be displayed in the Quick Toolbar by clicking the box to the right of the feature.
5. Enter the order number the feature will appear (from left to right).
6. To add a shortcut key, select it from the appropriate browser drop-down menu.
7. Repeat above steps for all the features to be added to the Quick Toolbar.
8. Click Save.
9. To view the added icons in the Quick Toolbar log out and log in or click Refresh in the browser.





New/Edit Mode

New/Edit Mode enables changes to be made to a window. Important points to remember about creating or editing information include:

1. New or Edit must be selected to change or modify.
2. Once New or Edit mode has been selected the user cannot exit the current window without saving or canceling.
3. Any bold caption indicates information must be entered in the associated field before the record can be saved.
4. When editing, the information is locked by the current user, so no other user can modify the same record at the same time.

Search Mode

Search Mode enables for search throughout the system or outside sources, such as Z39.50 hosts. Searches can only be conducted in certain windows. Important points to remember about Search Mode include:

1. Search terms are entered into the search fields.
2. Press Enter or click Find or Search to begin the search.

Read Mode

Read Mode allows for viewing window information. Important points to remember about Read Mode include:

1. Changes cannot be made in Read Mode.
2. New or Edit must be selected to make changes.

Copy Grids

Insignia offers the option to view copy grids with barcodes, library information, and the barcode of the patron who checked out the item in search screens and find/add patron.

Enhanced Error Messages

Insignia offers the option to send a notification of an error message event to Insignia or call Insignia when the event occurs.

Escape Key

Important points to remember about the Escape key:

1. In **New/Edit mode**, pressing the Escape key will prompt a message asking the user if they want to save or lose changes for the current record.
2. In **Read mode**, pressing the Escape key will close the current screen.
3. In **Search mode**, pressing the Escape key clears the current criteria. Pressing the Escape Key for a second time closes the current window.

Help Menu

ILS provides an on-line context-sensitive help file for all the features in the library system. To open the help file click **Help > Show Help.**

Chat List

Click the menu **Help > Chat List** to create a list of patron contacts in the database. After sending the instant message, the chat window can scale to show more or less characters in the window.

Knowledge Base

Click the menu **Help > Knowledge Base** to search for Knowledge Base cases which document specific technical scenarios which may not be covered in the manual. Search articles by keyword, title, and article ID to find out more information.

New Cases

To document your own technical support case, click **Help > New case** where you can view any case submitted by your district. This includes a separate tab for case history where a hyperlink is provided to view the status and submit feedback on the resolution. New cases will save any missing information and attachments such as screenshots of examples can be submitted. The ability to submit cases will be permissions based and will be available to the groups Librarian, Cataloger, or Admin.

Online Meeting

Click **Help > Online Meeting** if requested from the Insignia Technical Support team. When prompted, click Run/Open. Once the link is established a meeting ID and 4 digit password will be provided, please provide these to the Insignia Technical Support.

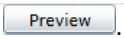
OPAC Link

Click **Help > OPAC** when needed to open the OPAC.

Payment Notification

When one library collects a fine on behalf of another library, a notification is sent to the other library informing them of the transaction.

Printing

To print a list or report from a window, click 

. This will provide a print preview of the form to print. From the preview window the option to print will be available at the top of the window in the form of a printer icon.

Release Notes

Release notes can be retrieved by clicking **Help > Release Notes**. Release notes can be filtered by date, module, and version number. New release notes will also appear in a pop-up message when Insignia provides an update.

Renewal

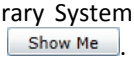
A notification will automatically send to Insignia when the expiry date for the program approaches.

Self-Checkout

Self-Checkout allows patrons to login to Insignia to use the modules Check In, Check Out, and Computer Booking. The computer booking will default to have an unchecked print list.

Tip: Patrons cannot use Self-Checkout without their password and patrons cannot use Self-Checkout when their library card is close to the expiry date.

Show Me Videos

Insignia Library System provides instructional ShowMe videos for all features in the system. To view a video, simply click 

. Show Me videos are a self-paced learning tool designed for new users to learn the system or refresh training.

Spell Check

ILS has an integrated spell check when data is entered in the form of notes. Text color of words identified as misspelled will change to red. To correct the spelling, right-click the word and suggested spelling corrections will be listed. In order to correct the misspelled word, left-click a selection from this list.

Windows

ILS allows the user to open multiple windows and organize them by minimizing or maximizing windows. In addition, the ILS will stack all minimized windows at the bottom of the screen.

Search Module

Insignia Library System provides various search engines to meet the needs of customers. Records can be retrieved from the local library catalog, a union catalog, and any library that is Z39.50 compliant.

Search Engines Available

1. Advanced Search
2. Authority Search
3. Classification Search
4. Kiosk Search
5. Simple Search
6. Z39.50 Search

Regardless of the search engine used, the results are displayed in a consistent and user-friendly manner.

Features

Insignias search engines provide the features listed below:

1. Copy List
2. Favorites List
3. Union/Local
4. Reserve
5. Print

Copy List

The **Copy List** is shown on the lower grid in the search results window. It provides copy information such as the items call number, location, status, and barcode. If the item is on loan the copy list provides the borrowers name and the item due date.

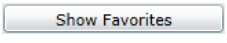
Tip: When searching by barcode, only the copy with that barcode will be returned in the search.

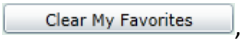
Favorites List

The **Favorites List** is used to save a list of selected titles as a collection. Titles in the list can be printed or emailed. A favorites list can be created from the results of any of the Simple, Advanced, Classification, and Kiosk searches.

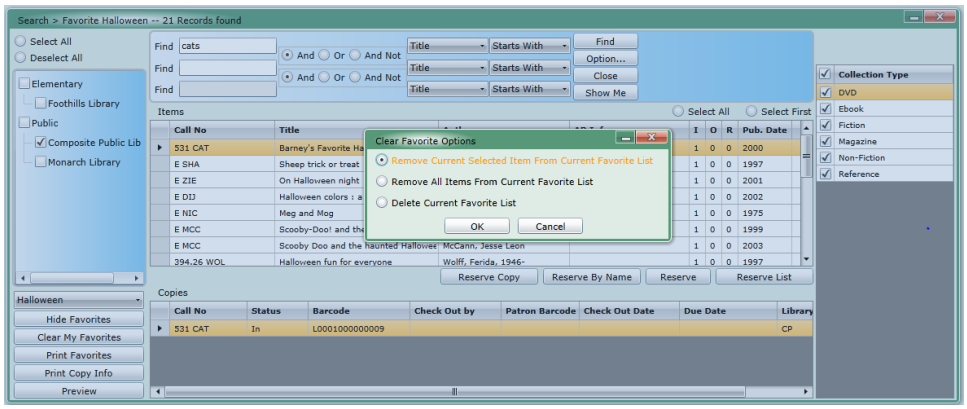
1. Click **Search > Simple Search**.
2. Enter search terms into and press Enter.
3. Select a preferred title from the result grid by clicking on it.
4. Click

on the bottom left.
5. Select an existing Favorites list or select

to create a list.
6. See titles in a Favorites list, by clicking 

and selecting the list name from the drop-down.
7. To delete an item from a Favorites list, select the title from the list and click 

, and pick one of the options in the following screenshot:



Union/Local

If the library is part of a union, the local library or the entire union can be searched by selecting the appropriate box in the upper left corner of the Simple Search window. In Advanced Search, specific libraries can be searched by selecting one or more libraries from the list of libraries.

Reserve

Double-clicking an item in the results will bring up a window with the item details. Patrons can then Reserve the item under their name and barcode and view the current Reserve list (list of current reserves on the item).

Tip: The patron's barcode will be shown in Check Out By and Patron Barcode if the search result listing is on loan.

Print

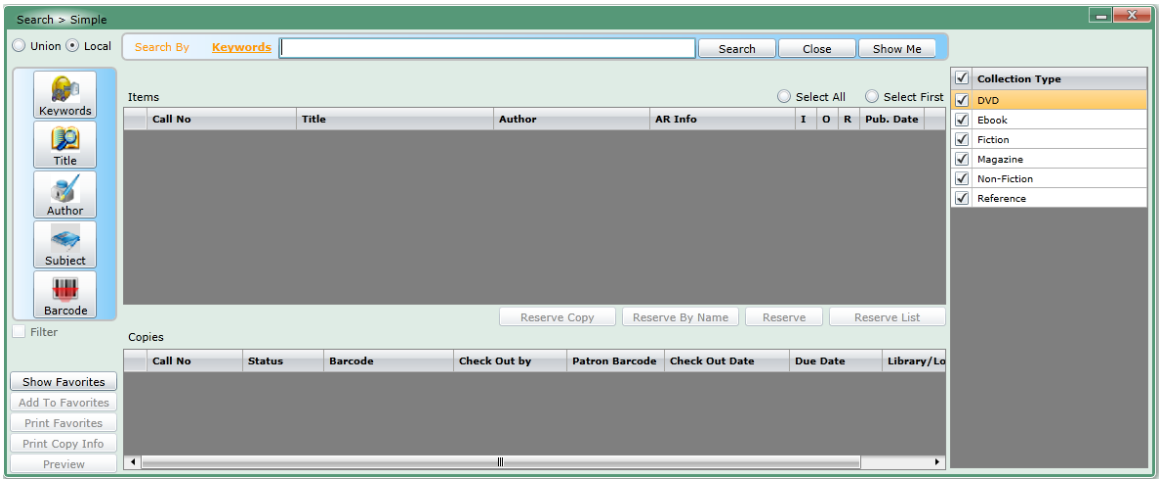
The search results can be printed by clicking the Preview button on the bottom left of the search window after conducting the search. The print preview will appear in order to ensure the appropriate form is being printed. To continue with the print process, click the print icon. The Favorites list and copy information can also be printed by first clicking on Show Favorites.

Simple Search

Simple Search allows patrons to search for an item by **keyword**, **title**, **author**, **subject** and **barcode**.

Filter

Checking Filter on the bottom left of the Simple Search screen will apply any new search term to the results returned in the preceding search. This feature enables a search within search results. It is a useful feature when limiting a search.

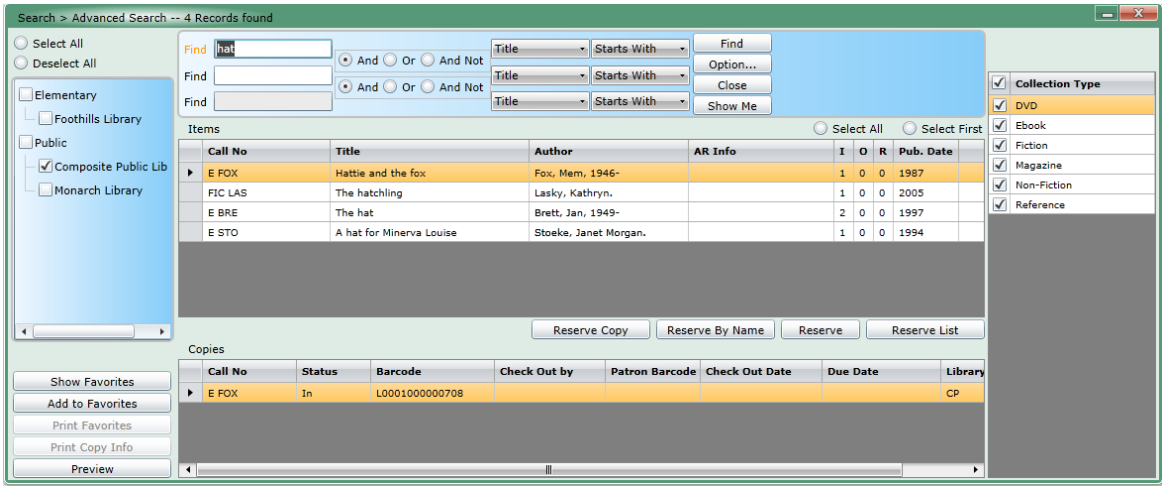


Search

1. Click **Search > Simple Search** from the menu.
2. Type the search query in the search field.
3. Select the search criteria by clicking on the relevant icon on the left side of the screen.
4. Limit the collection type by selecting the collection type on the right hand side of the screen.
5. Limit by Local or Union database select the appropriate option in the top left corner.
6. Click Search or press Enter.
7. Double-click the item in the grid to view item information from the results.
8. Filter a current search by clicking the Filter checkbox on the left-hand side and entering new search criteria and click Search or press Enter.

Advanced Search

Advanced Search provides Boolean search options. The search uses parameters such as publishing date, collection type, audience type, language, and material type.



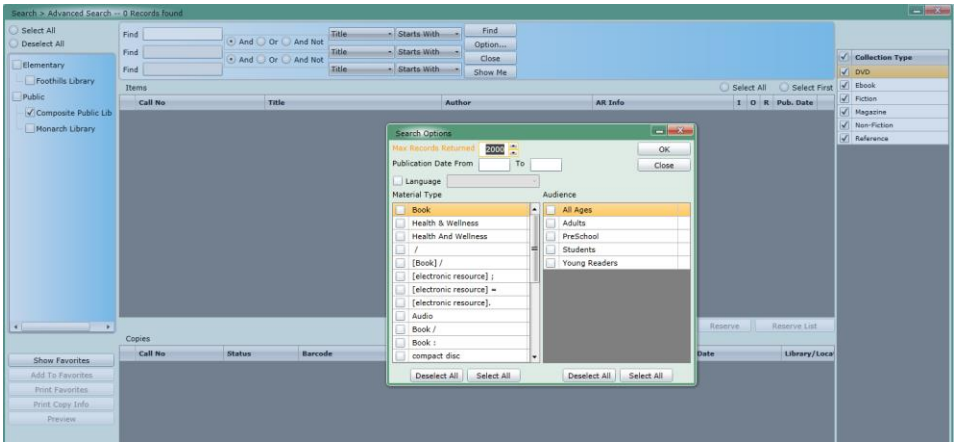
Find

1. Click **Search > Advanced** from the menu.
2. Enter a search term in the search field.
3. Select the search criteria (i.e. Starts With, Exact Match, Any Match).
   3.1. Two or more additional search terms and Boolean operators can be used to refine the search.
4. If the library is part of a union, select the libraries to be searched.

5. Select the Collection Type to be searched and click Find.

Options

Advanced Search allows further refined searches by applying additional search filters. This can be done by clicking on Option... . Filters include:



1. Maximum results (set in **Administration > Configuration > Catalog**)
2. Publication year
3. Language
4. Material type
5. Audience type

Authority Search

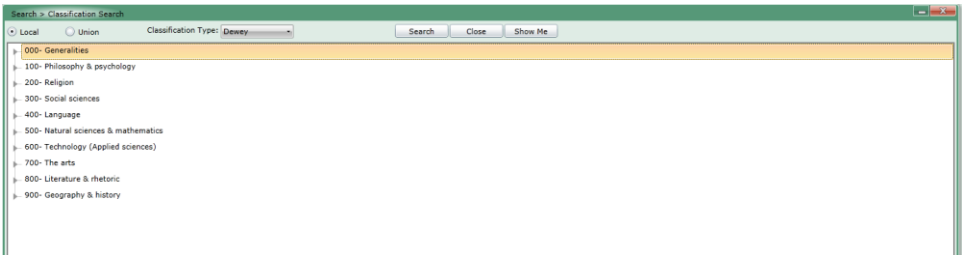
Insignia Library System provides complete authority control and allows browsing authority indexes for personal names/authors and subjects.

Search

1. Click **Search > Authority**.
2. Select an index to search (i.e. author or subject).
3. Type the search term or a partial term (in which case the system will go to the first term in the index that matches entry) and press Enter.
4. Click on an index term to see items linked to that term in the item box display at the bottom of the window (See Also references are provided).
5. Double-click a selected item in the bottom window to view the Item Information including the Basic and MARC record for that copy.
6. The Authority Search enables browsing authority terms previously searched by clicking the Forward and Back buttons.

Classification Search

The Classification Search enables browsing through both the Dewey Decimal and Library of Congress classifications. Items are assigned to the classification search index according to the items Call Number.



Search

1. Click **Search > Classification** from the menu.
2. Select the Classification Type from the drop down at top of the window.
3. Select either the Local or Union option at the top left of the screen.
4. Expand the levels by clicking .
5. Select the desired Classification level.
6. Click Search or press Enter.
7. ILS will list all the items in the library in the given classification.

Kiosk Search

Kiosk Search provides a visual search using pictures that correspond to categories. This search is fully customizable. Users are able to build categories and select the corresponding images. The categories can be leveled following broad categories to more specific. Information about setting up Kiosk categories is available in the Administration section.

Picture Search

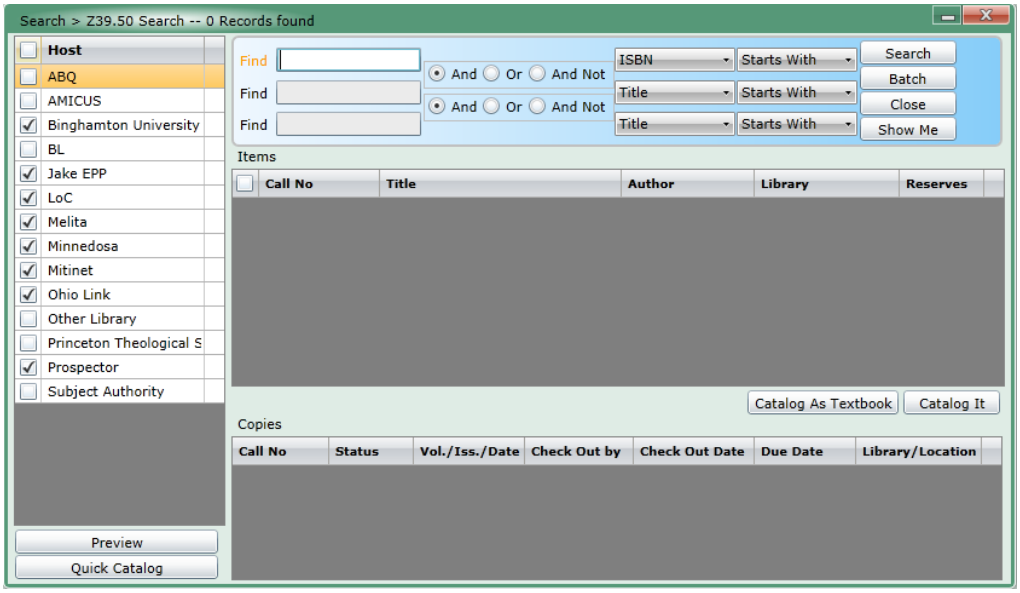
1. Click **Search > Kiosk** from the menu.
2. Click a picture that best represents the topic being searched.
3. Continue to click images to further specify the search, or click the underlined topic in the pathway displayed above the pictures to see all results.
4. All items linked to that category will be displayed in results.

Z39.50

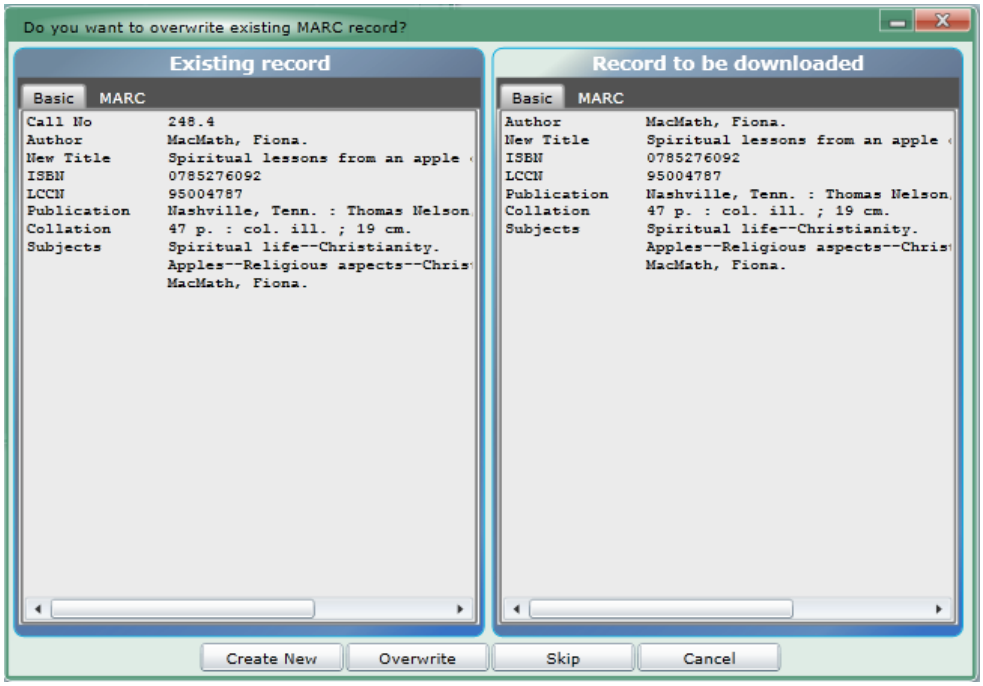
The **Z39.50** provides the ability to conduct remote searching that support Z39.50 information retrieval protocol for records. Once a MARC record has been retrieved, this search provides the ability to import the record for easy cataloging.

Tip: If your Custom Setting are set to system-based rather than to local library-based, the record overwritten could exist at any of the local school sites.

1. Click **Search > Z39.50** from the menu.
2. Select the libraries to search listed under Host.
3. Enter the search term.
4. Select the search parameters (i.e. ISBN, Title, and Author). The fastest way to retrieve a MARC record is to search by ISBN. If no match is retrieved by ISBN then try by searching title and author.
5. Select the search criteria (i.e. Starts With, Exact Match, Any Match).
6. Press Enter or click Search.
7. Click Cancel to stop searching the Z39.50.
8. Double-click to see details on a record.



9. To import the MARC record into the existing collection, select the item from the grid and click Catalog It. If it is to be cataloged as textbook, click Catalog As Textbook.
10. If there is already a MARC record in the system, Z39.50 will show the following prompt:
11. Create New creates a new record in the system.
12. Overwrite will erase the record found in the system with the record from the Z39.50. If you are not certain of which MARC record is being erased, please click Create New instead.
13. Skip will not import the Z39.50 record into the system but it will prompt you to add copies to the item record already found within your system.



14. The MARC record can be edited before importing by double-clicking on the record and clicking the Edit MARC.
15. Click New Tag or Subfield to modify the MARC record before importing it into your system.
16. To batch catalog multiple ISBNs, click Batch and click Search.

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Circulation Module

The ILS Circulation Module has a variety of features that enables users to easily check in and checkout items for patrons. This module is fully customizable therefore, it must be configured prior to use. Configuration is further discussed in the **Administration Module**.

Features available in Circulation Module

1. Checkout
   1.1. Checkout
   1.2. Collect Fines
   1.3. Reserve
   1.4. Booking
2. Homeroom Checkout
3. Check In
4. Renew
5. Loan History
6. Upload Offline Circulation
7. Reading Preferences
8. Teacher Checkout List
9. Patron Traffic and Patron Inquiry
10. Alerts
11. Lists
    11.1. Booking List
    11.2. Reserve List
    11.3. Temporary List
12. SRP Gift
13. Computer Booking
14. NCIP ILL

Check Out

The Checkout window is very powerful as it provides access to many of the features in the Circulation module.

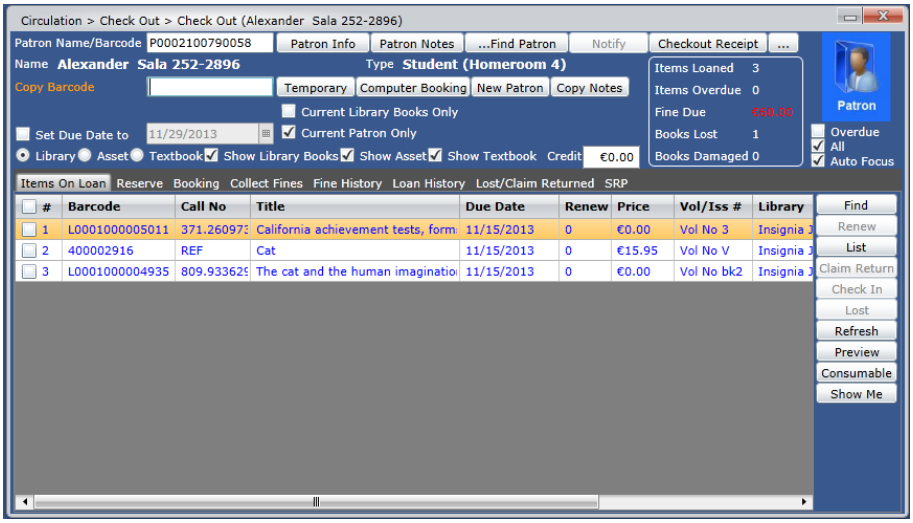
Items on Loan

1. Click **Circulation > Check Out** from the menu.
2. Scan the patron card or enter the patron's name in the field entitled Patron Name/Barcode.
3. Scan the barcode or type it in.

If the item has been successfully checked out to the patron it will appear in the tab, Items on Loan as displayed below. .

Tip: Typing only the first few letters of the patron's name will provide results. I.e. typing ali smi and pressing enter retrieves the patron information for Alicia Smith.

Buttons and Checkboxes



Checkout a Kit

When scanning an item cataloged as part of a kit, a reminder will appear to confirm all items in the kit are being checked out. If an item is missing from the kit there is the option to cancel before completing the checkout process.

Checkout Receipt

Clicking Checkout Receipt will print a receipt for items being checked out. Click ... to modify the margins Select the overdue checkbox to print overdue item. To print all items currently checked out to the patron select the all checkbox. These selections are provided beneath the patron photo.

Copy Notes

To add notes to the copy record, click the Copy Notes button. The history of notes will be linked to the copy barcode. The notes will appear in the copy information screen under the Notes History tab.

Tip: If you are checking out a textbook, the default Circ Type being searched under barcode will be set to textbook.

Library Checkout and Textbook Checkout Options

This default option is checkout library books, and specifies that library books are being checked out. The textbook checkout option, when selected, specifies that textbooks are being checked out.

Tip: If barcodes for textbooks and library books are unique, there is no need to select the checkbox to identify the barcode being scanned is a textbook or library book.

Temporary Items

Click this button to quickly catalog a book and check it out.

Check In

To check in items from the checkout window, select the items and then click Check In.

Tip: It is recommended items should be checked in by using check in window, this check in button is useful if a patron changes their mind during checkout and does not want to check out the item.

Notify

Select the Notify button to send out an email listing items checked out or overdue by the patron. A dialog box will confirm if the email was successfully sent.

Set Due Date Checkbox
Staff may change the default due date for any item being checked out. To change the default due date from the Checkout screen, check the Set Due Date To checkbox and select the new date. Until the checkout window is closed, or the checkbox is unchecked, or new patron is scanned the checkout date will remain in effect instead of the due date based on circulation parameters for the current patron.

Tip: Change the due date for only the current patron by ensuring the Patron Only checkbox is checked. To make the change for more than the current patron ensure the Patron Only checkbox is unchecked.

Internet Agreement Signed
This checkbox will show on the checkout window and indicates if the if the patron has signed the internet agreement form. This allows them to book computers.

Current Library Books Only
Will apply the setting for due date only for library books scanned in.

Show Library Books
Selecting this checkbox will show library books in checkout grid.

Show Asset
Selecting this checkbox will show assets in checkout grid.

Show Textbooks
Selecting this checkbox will show textbooks in the checkout grid.

Credit
This textbox show the amount of paid credits available on a patron account to pay for services or fines.

Loan Statistics
This box shows the following numbers for circulation statistic purposes: Items Loaned, Items Overdue, Fine Due, Books Lost, Books Damaged.

Overdue or All Checkbox
Select either overdue checkbox to see the overdue items or select all to see all of the items on loan in the grid below.

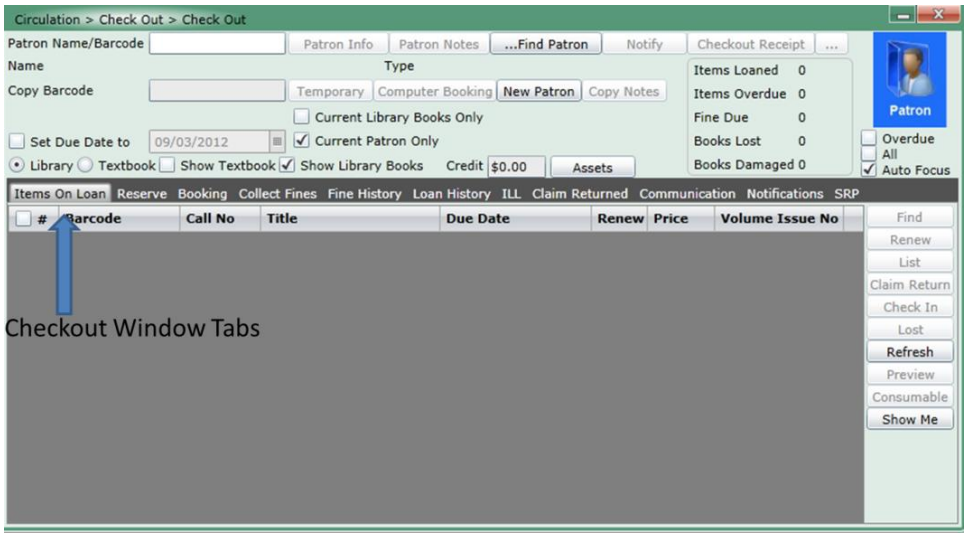
Auto Focus
Selecting the Auto Focus checkbox will force the cursor to remain in the barcode field for scanning.

Override Default Permission
ILS is designed to enable staff to override restrictions. If a patron cannot checkout items, due to the constraints on their loan profile, a popup message will prompt the user to enter the override password.

Tip: Override password can be set in Administration > Library Setting > Configuration > Circulation.

Check Out: Tabs

From checkout interface in 1-2 mouse clicks user can access any circulation feature such as checkout, renew an item, mark an item lost, mark an item claimed returned, reserve an item, collect/waive fines.



Items on Loan

The Items on Loan tab lists all the items currently checked out by the patron. From this tab, items can be checked in, marked as lost, claimed returned, or renew items. The items in red are overdue, the items in black are checked out (not overdue), and the items listed in blue have been checked out today.

Tip: The library name will show up in the checkout grid, and books from another library will show up in a different color.

Find

If a patron needs to check out a book but the barcode is not present to scan, click Find to search for the book.

1. Click **Circulation > Check Out > Checkout**.
2. Scan in the patron card or enter the name and press enter.
3. Click Find.
4. Search for the book by title, ISBN, author, subject, keywords, and so on.
5. Click Search and click Checkout.

Tip: This window will also allow you to recall a book already checked out and reserve a book.

Renew

This will allow a loan period to become lengthened if the book is already checked out.

1. Click **Circulation > Check Out > Checkout**.
2. Scan in the patron card or enter the name and press enter.
3. Select the checkbox next to the item to renew.
4. Click Renew.

List

Select the List button to print the list of items checked out by the patron. A dialog box will prompt if all items checked out by the patron or only those checked out today be printed. To print only todays checked out items, click Yes. To print all items on loan click No.

1. Click **Circulation > Check Out > Checkout**.
2. Scan in the patron card or enter the name and press enter.
3. Click List.

Claim Return

If a patron claims they have returned an item when the record shows that item has not yet been returned, select the item and click Claim Return, specify the date when it was claimed to have been returned and click Claim Return. The item will be removed from the Items on Loan screen and is marked with a status of Claimed Returned. The system will not charge any overdue fines since the date it was claimed returned.

1. Click **Circulation > Check Out > Checkout**.
2. Scan in the patron card or enter the name and press enter.
3. Select the checkbox next to overdue and/or list items.
4. Click Claim Return.

Lost

To mark an item as lost, select the checkbox for the item and click Lost. The lost items will be displayed under the Pay Fine tab. When a lost item is returned a refund is prompted. For this feature to be enabled, AutoReturn must be turned on in **Administration > Custom Setting**.

1. Click **Circulation > Check Out > Checkout**.
2. Scan in the patron card or enter the name and press enter.
3. Select the checkbox next to the item to be declared lost.
4. Click Lost.

Refresh

This will bring up new data into the check out window that may have not appeared right away when updating information elsewhere.

1. Click **Circulation > Check Out > Checkout**.
2. Scan in the patron card or enter the name and press enter.
3. Click Refresh.

Preview

This will print a report of a patron's books checked out or renewed today in another window.

1. Click **Circulation > Check Out > Checkout**.
2. Scan in the patron card or enter the name and press enter.
3. Click Preview.

Consumable

If a patron needs to check out a notebook or other material that they will consume for a price without checking it in, click Consumable.

1. Click **Circulation > Check Out > Checkout**.
2. Scan in the patron card or enter the name and press enter.
3. Click Consumable.
4. Type in the title or ISBN number and click Find.
5. Click Checkout.
6. The item will appear on the Check Out window with the price beside it.

Reserve

The Reserve tab lists all the items currently on reserve for the patron. Items that are available for pickup are shown in green. To reserve an item click the Find button to find the title, select it and click Reserve.

The reserve can be cancelled by clicking on the checkbox beside the item on reserve and then click Cancel. Reserve can be used by searching by title or copy barcode.

Booking

The Booking tab lists all the items booked for the patron. The booking feature enables a specific copy or copies to be held for future dates. Items that are available for pickup are shown in green. To book a copy, click the Find button to find the title, select the copy of the title and click Book and specify the date.
Cancel a booking by clicking the checkbox for the item and click Cancel.

Collect Fines

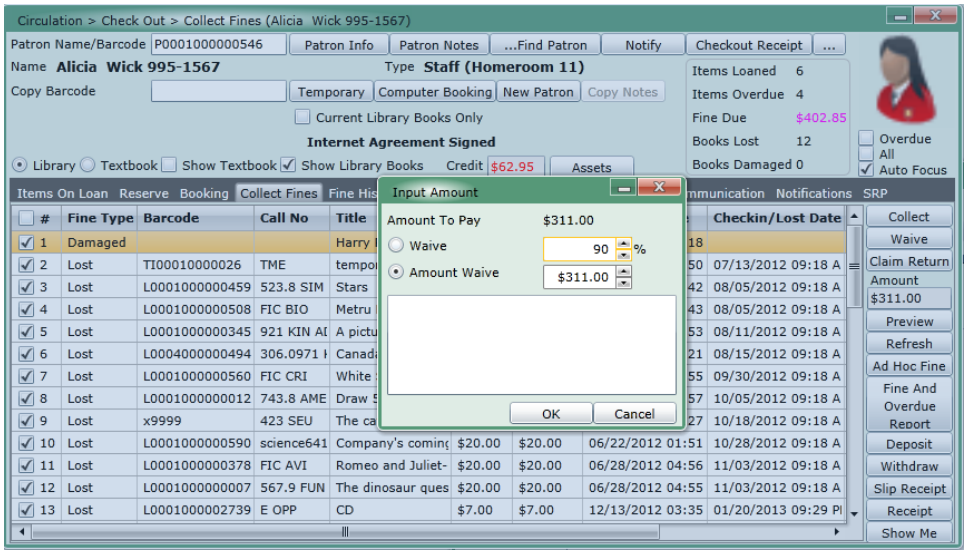
From the Collect Fine tab, fines from lost or overdue items can be viewed. In addition, fines can be waived or collected in full or partial amounts. Also, ad hoc fines can be assigned to a patron. Receipts documenting payment, withdrawal, and deposit can be printed from this tab.

Collect or Waive

1. Scan the patron card or enter the name.
2. Click the Collect Fine tab.
3. Click the Checkbox for the item(s) for which fine will be either collected or waived.
4. Click Collect or Waive.
5. If selecting Waive, a percentage can be selected to Waive.
6. Enter the amount.
7. Click OK.

Ad Hoc Fine

1. Click Ad hoc Fine.
2. Specify the fine type and amount charged. Ad hoc fine types can be added in **Administration > System Setting > Parameters > Select Fine Types**.
3. If the fine is for an item, scan the associated barcode to retrieve the item title and click Find Title By Barcode.
4. Click OK.



Fine and Overdue Report

1. Click. Fine And Overdue Report
2. The call number, notes, title, barcode, fine type, fine assessed, and fine due will print with the patron's name and address in the request to pay the fine.

Deposit

1. Click Deposit.
2. Input the amount for deposit.
3. Write a note associated with this deposit.
4. Click OK.

Withdraw

1. Click Withdraw.
2. Input the amount for withdrawal.
3. Write a note associated with this withdrawal.
4. Click OK.

Slip Receipt

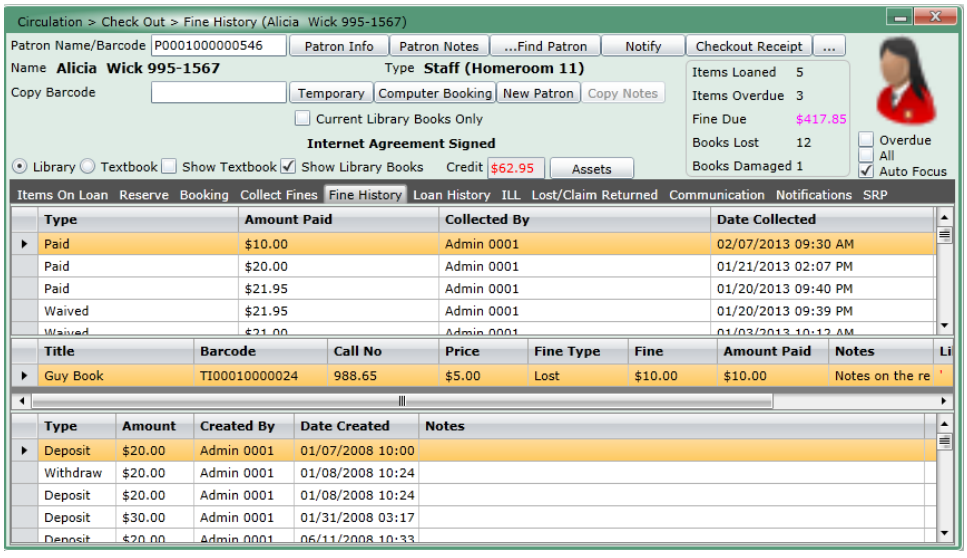
1. Click Slip Receipt.
2. A preview of a fine receipt will appear.

Receipt

1. Click Receipt.
2. Input the date range of the receipts recorded.
3. Click OK.
4. A preview of a fine receipt will appear.

Fine History

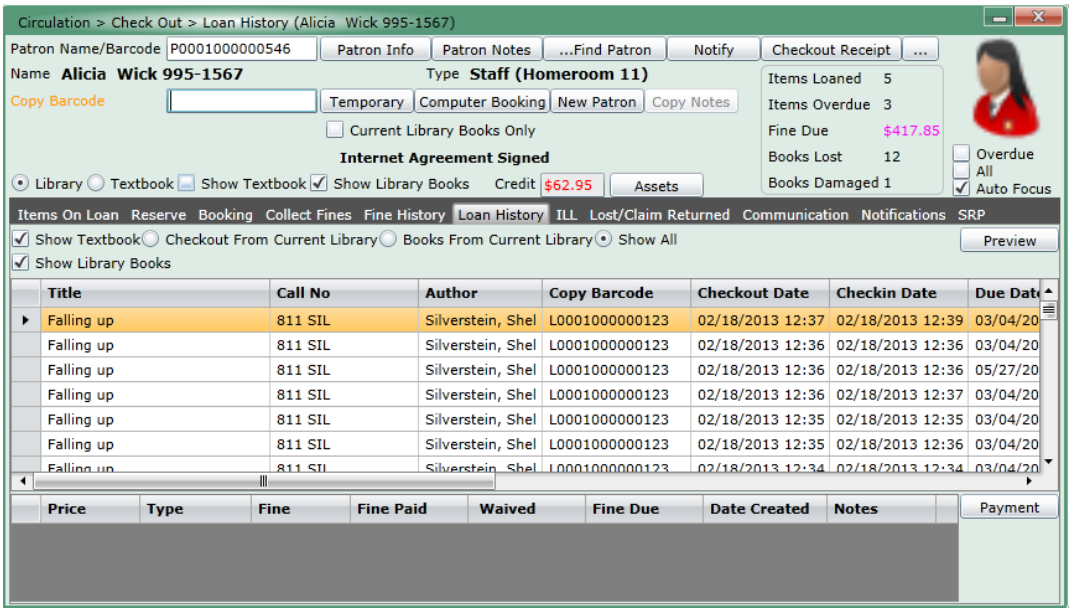
Fine History tab displays the patrons history of fines paid. As shown in the following image, the top grid displays the fine amounts that have been collected. The second grid displays what the fine amounts collected were applied to. The bottom grid shows the patrons deposits and withdrawals.


Circulation > Check Out > Fine History (Alicia Wick 995-1567)
Patron Name/Barcode P0001000000546
Patron Info
Patron Notes
...Find Patron
Notify
Checkout Receipt
Name Alicia Wick 995-1567
Type Staff (Homeroom 11)
Copy Barcode
Temporary
Computer Booking
New Patron
Copy Notes
Current Library Books Only
Internet Agreement Signed
Library Textbook Show Textbook Show Library Books
Credit $62.95
Assets
Items Loaned 5
Items Overdue 3
Fine Due $417.85
Books Lost 12
Books Damaged 1
Overdue
All
Auto Focus
Items On Loan Reserve Booking Collect Fines Fine History Loan History ILL Lost/Claim Returned Communication Notifications SRP
Type Amount Paid Collected By Date Collected
Paid $10.00 Admin 0001 02/07/2013 09:30 AM
Paid $20.00 Admin 0001 01/21/2013 02:07 PM
Paid $21.95 Admin 0001 01/20/2013 09:40 PM
Waived $21.95 Admin 0001 01/20/2013 09:39 PM
Title Barcode Call No Price Fine Type Fine Amount Paid Notes
Guy Book TI00010000024 988.65 $5.00 Lost $10.00 $10.00 Notes on the re
Type Amount Created By Date Created Notes
Deposit $20.00 Admin 0001 01/07/2008 10:00
Withdraw $20.00 Admin 0001 01/08/2008 10:24
Deposit $20.00 Admin 0001 01/08/2008 10:24
Deposit $30.00 Admin 0001 01/31/2008 03:17

Loan History

The Loan History tab shows the loan history of the patron. This tab presents a quick view of items checked out by the patron. If a fine was attached to the item it would appear in this tab. Loan history can be sorted by the date checked out, date returned, title or author by clicking on the respective column header.

Tip: An Ad Hoc Fine can be added from this window by scanning the barcode in the loan history for which you would like to add the fine.


Circulation > Check Out > Loan History (Alicia Wick 995-1567)
Patron Name/Barcode P0001000000546
Patron Info
Patron Notes
...Find Patron
Notify
Checkout Receipt
Name Alicia Wick 995-1567
Type Staff (Homeroom 11)
Copy Barcode
Temporary
Computer Booking
New Patron
Copy Notes
Current Library Books Only
Internet Agreement Signed
Library Textbook Show Textbook Show Library Books
Credit $62.95
Assets
Items Loaned 5
Items Overdue 3
Fine Due $417.85
Books Lost 12
Books Damaged 1
Overdue
All
Auto Focus
Items On Loan Reserve Booking Collect Fines Fine History Loan History ILL Lost/Claim Returned Communication Notifications SRP
Show Textbook Checkout From Current Library Books From Current Library Show All
Show Library Books
Preview
Title Call No Author Copy Barcode Checkout Date Checkin Date Due Dat
Falling up 811 SIL Silverstein, Shel L0001000000123 02/18/2013 12:37 02/18/2013 12:39 03/04/20
Falling up 811 SIL Silverstein, Shel L0001000000123 02/18/2013 12:36 02/18/2013 12:36 03/04/20
Falling up 811 SIL Silverstein, Shel L0001000000123 02/18/2013 12:36 02/18/2013 12:36 05/27/20
Falling up 811 SIL Silverstein, Shel L0001000000123 02/18/2013 12:36 02/18/2013 12:37 03/04/20
Falling up 811 SIL Silverstein, Shel L0001000000123 02/18/2013 12:35 02/18/2013 12:35 03/04/20
Falling up 811 SIL Silverstein, Shel L0001000000123 02/18/2013 12:35 02/18/2013 12:36 03/04/20
Price Type Fine Fine Paid Waived Fine Due Date Created Notes
Payment

ILL

The Interlibrary Loan tab displays the ILLs created for the patron. The information provided includes both the lending library and any comments. To checkout an interlibrary loan, select it and click the checkout button.

Lost/Claimed Returned

The Lost/Claimed Returned tab displays all the items the patron has claimed that they have returned to the library. This tab will maintain an ongoing list of items marked as claimed returned by the patron. It includes a current status column which will show if the item was found or still remains claimed returned.

Communication

The Communication tab provides a list in the top grid of all the types of communication sent, the date it was sent, and the text contained in the message. The bottom half of the window allows messages to become added and sent to the patron, including an automatic reply message. The Type dropdown menu can be notified in Parameters by selecting “Notification Type” . from the dropdown menu.

Notifications

The Notification tab provides a running list of all Notifications sent to the current patrons. It lists the type of notification and the comments contained in that notification.

SRP

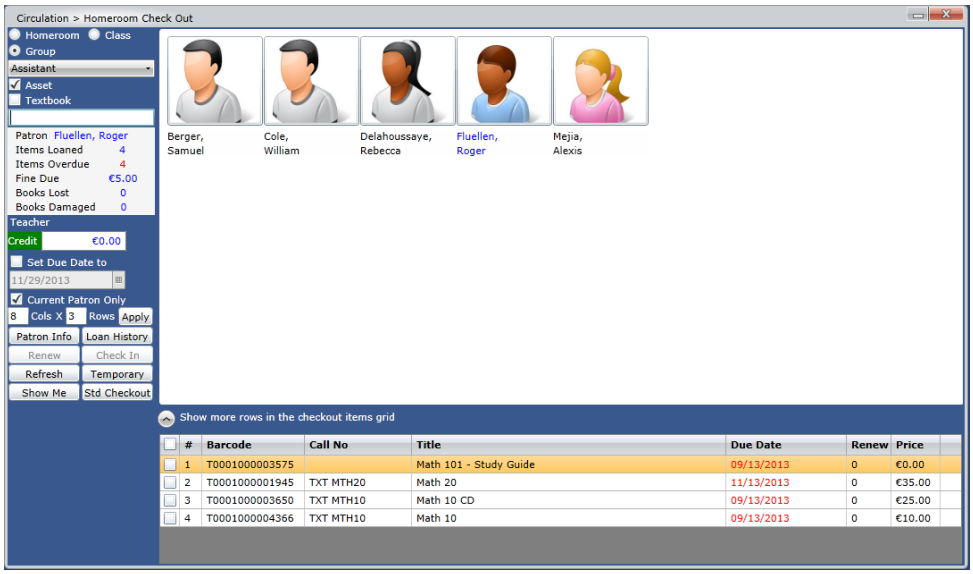
The Summer Reading Program **(SRP)** tab shows the current summer reading program selected, program gifts, and reading counts. This tab is used to track the books read by the patron.

Homeroom Checkout

Homeroom checkout is a quick way to check out books to a homeroom or a class. It is best used when an entire class comes to the library at once.

1. Click **Circulation > Homeroom Check Out**.
2. Select a homeroom, group, or a class to checkout.

3. No patron picture will be selected, so click a patron picture.
4. To adjust the amount of patrons showing in the window, insert the desired values in Cols and Rows and click Apply.
5. The patron's information and loan history are accessible from this window by clicking Patron Info or Loan History.
6. Scan or enter the barcodes of the items to be checked out to that patron.
7. An item can be labeled as a Temporary Item by clicking Temporary which will prompt for minimal cataloging information. This is a quick way to partially catalog an item for a patron to check out.
8. To check out a textbook, select the Textbook check box.
9. To check out an asset, select the Asset check box.
10. To access the regular check out for a patron, select the patron and click Std Checkout.
11. To set a manual due date, check the Set Due Date check box.
12. Select the new due date and scan in the barcode.



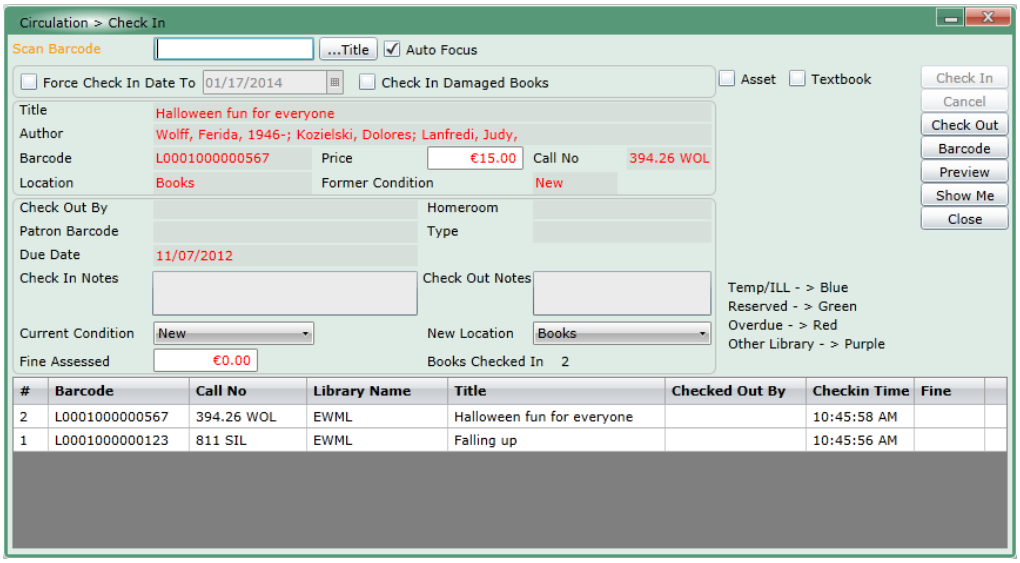
Check In

From the checkin interface the user can check in library materials. During check in, the user can also specify fine for damaged items or reset checkin date.

1. Click **Circulation > Check In**.
2. Scan the item barcode (Repeat for multiple items).

Tip: If barcode is missing select the Browse button denoted by the (…), find the item and click Check In.

Items, notes, and library names checked in appear in different colors.
Red: item is overdue or item has check in notes
Green: item is on reserve
Purple: item is from another library branch
Blue: item is a Temporary or Interlibrary loan item
Tip: If an item is on reserve, a message will confirm that. If a fine has been accumulating including overdues, it will show on the bottom left hand corner for the book checked in.



Force Check In Date to

In the ILS, the check in date can be changed. This feature is useful in the event of an interruption in library service and library books are unable to be returned resulting in fines. This is also useful in discharging a book drop.

1. Select the Force Check In Date to checkbox.
2. Type in the date in the date field or click the calendar icon to select a date from the calendar.
3. Scan the barcode or click ... to search for the item.
4. Until this window closes or the check box deselects, all items will be checked in as if they were returned on the date specified.

Check In Damaged Books

Assign fines to patrons for damages.

1. Select Check In Damaged Books checkbox.
2. Scan barcode or click ... to search for the item.
3. Specify the condition, fine, location and comments.
4. Click Check In.

Reserve

The reserve feature enables users to put holds on items that are currently unavailable. The ILS has the ability to send an email to the patron when an item is reserved and another email to be sent when the item is available.

Find

1. Click **Circulation > Check Out > Reserve**.
2. Scan in the patron barcode or enter the patron's name.
3. Press Enter.
4. Search for the item to reserve by clicking Find.
5. User can reserve multiple items at once pressing Ctrl or Shift.
6. Select the item from the search results and click Reserve.
7. To reserve a specific copy select the title, then select the barcode in the grid below and click Reserve Copy.
8. Click Close.

Cancel

Cancel will take the item out of the reserve queue for the reserve permanently.

1. Click the left-hand checkbox.
2. Click Cancel to remove item from list.

Suspend

Suspend will take the item out of the reserve queue for the reserve temporarily.

1. Click the left-hand checkbox.
2. Click Suspend to temporarily remove item from the reserve queue.
3. Suspended items will show in red on the reserve list.

Resume

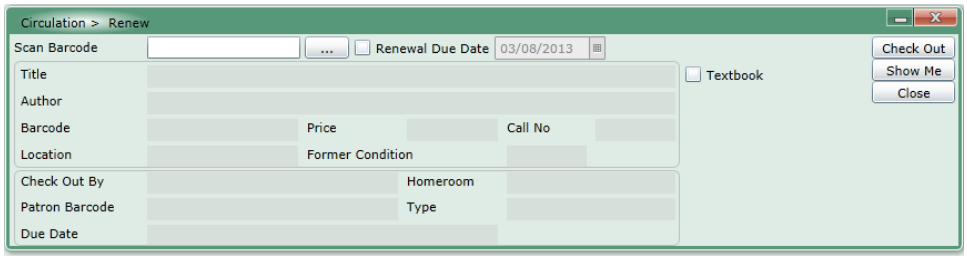
Resume will put the item back in the same place in the reserve queue before clicking Suspend.

1. Click the left-hand checkbox beside items with red text.
2. Click Resume to suspended items back into reserve queue. The text will turn black.

Renew

This feature renews multiple items.

1. Click **Circulation > Renew**.
2. Scan the barcoded of items to renew or click … button to locate the items through search**.**
3. Change the renewal due date by checking the box to the left of renewal due date and type in the new date or click the calendar icon to choose a date from the calendar.
4. Change to check out from the renew window in a patron's profile by clicking the checkout button and the patron's profile will be loaded in the checkout window.



Booking

This feature is used to reserve an item in the future. For example, a patron may want to reserve material they will need at a later date for a specific time period. If the checkout/due date overlaps the booking date range it will not be able to be checked out and renewing the item will not be permitted if it overlaps with the booking date range.

Find

1. Click **Circulation > Check Out > Booking**.
2. Scan in patron barcode or enter the patron's name and press enter.
3. Click Find in the right column and find the item patron wants to book.
4. Select the copy of the item preferred.
5. Click Book.
6. Specify the date range required and click OK.

Edit

1. Double click the item to be edited.
2. In the Booking Detail dialog box click Edit.
3. Specify new Required Date From and Required Date Until.
4. Click Save.

Cancel

1. Select the item to be canceled.
2. Select the checkbox left of the item.
3. Click Cancel.
4. Confirm it.

Loan History

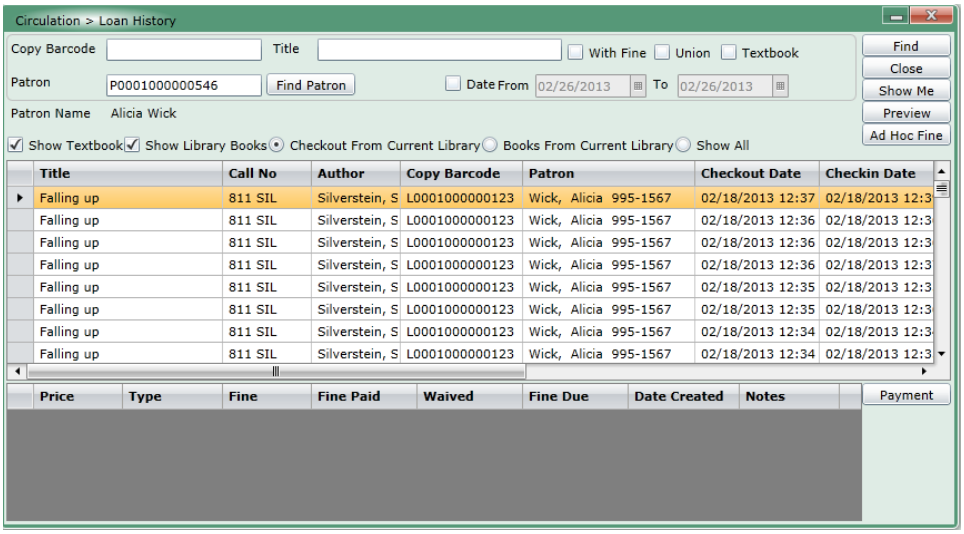
Loan history allows staff to easily see the history of a specific patron or a specific item or a title.

Tip: In order to enable this feature, the Track Loan History option must be enabled on the Circulation tab (in **Administration > Library Setting > Configuration**).

Find

To see loan history for a patron, a title or an item, follow these steps:

1. Click **Circulation > Loan History**.
2. Enter the copy barcode, the patron barcode or the title of the item.
3. Specify whether or not the title is a textbook, a union record, or if it has fines.
4. Specify the date range in which the title became checked out.
5. Select whether or not the results should show textbooks, library books, items checked out from the currently library, books belonging to the current library, or select all.
6. Click Find or press Enter.
7. Click Ad Hoc Fine to add a customized fine to any of the patrons associated with the title selected.
8. View the fine history of any item selected in the bottom grid.



ILL (Inter-Library Loans)

This feature enables an item that has been requested from another library outside of the library union to be cataloged in the borrowing library's system.

1. Click **Catalog > Cataloging > ILL Cataloging**.
2. Click New.
3. Enter the information available.
4. In the Request Info find the requesting the Interlibrary Loan.
5. In the Request From dropdown, select which library to pick up the item from.
6. Add the Request Date if different from the date indicated on screen and the Return Date.
7. Add any Comments for this request.
8. Save the request.
9. A Temporary barcode will appear.
10. Contact the library regarding the ILL request.
11. The ILL saved can be seen on the patron's check out window under the ILL tab.
12. When the item is received, go to Find/Add Interlibrary.
13. Search and select the item.
14. Click Receive.
15. Scan a local barcode that user wish to affix to the item and click OK.

<u>Reserve List (not a part of library consortium)</u>

1. Login as the other library to receive the ILL copy.
2. Click **Circulation > List > Reserve List**.
3. Scan the barcode of the ILL copy and the status becomes Available.
4. When the ILL item is available, an email notification is sent out to let the patron know their reserve is available to be picked up.

Note: The e-mail notification that is sent can be modified in the System Messages under the Type: Interlibrary loan request message.

5. This notification will appear on the Notification tab in Check Out.
6. This notification will also appear in the ILL tab in My Account in the OPAC.

ILL (Intra-Library Loans)

ILS comes with a comprehensive inter-library loan component.

Find

1. Click **Circulation > Check Out > Reserve**.
2. Scan in patron barcode or enter the name and press enter.
3. Click Reserve tab.
4. Click Find.
5. Select Other Libraries option at the bottom left.
6. Search for the title.
7. Select the title and click Reserve.
8. This will generate an Alert for the other library.
9. The other staff will go to Reserve list.

Reserve List (Send ILL)

1. Click **Circulation > List > Reserve List**.
2. Select the title and scan the barcode of the items on reserve.
3. Click Send and the status of the barcode will become Outbound.
4. The book will then be shipped to the other library.
5. The receiving library will scan the barcode of the copy received.
6. Requesting library will check out the book to the patron and the status will become Out.

Check Out: ILL Tab (Check Out ILL Copy)

1. The Interlibrary Loan tab displays the ILLs created for the patron.
2. The information provided includes both the lending library and any comments.
3. To checkout an interlibrary loan, select it and click the checkout button.
4. Once the ILL item is checked out the status becomes Out.

Check In

1. When checked in, the ILL item status becomes Inbound and a message will indicate the item is from ILL.
2. ILL Items in the Check In window will appear in blue font.
3. ILL item is shipped back to the Owning Library.
4. When the Owning Library checks in the book, the status will become In.

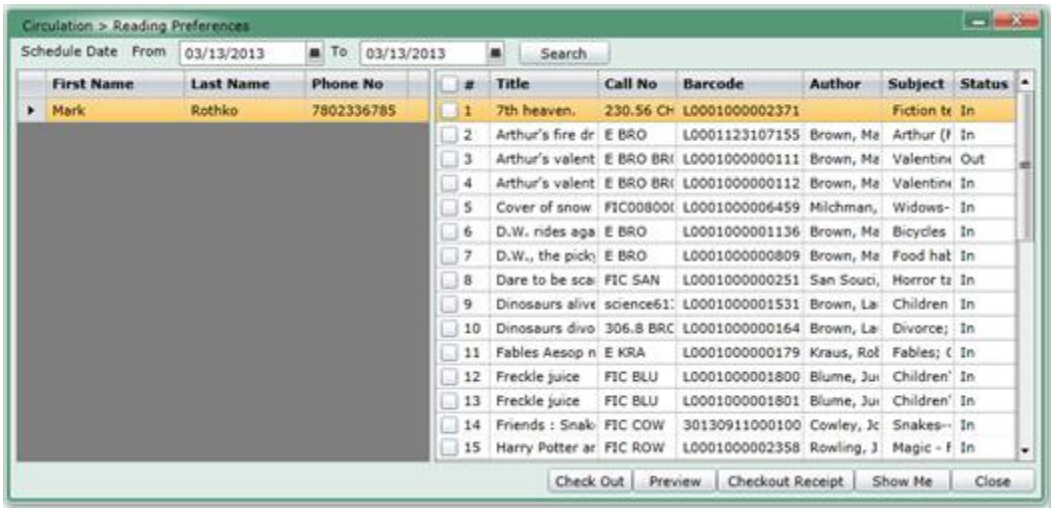
Circulation Reports

The following reports are available under the Circulation Tab:

1. **Items Checked Out to Other Libraries:** Lists all interlibrary loans lent to other libraries.

Reading Preferences

Reading preferences automatically selects items for patrons that they have not read based on their preferences. It only includes items that patrons have not borrowed from the library. Libraries use this program for bookmobiles and the feature tracks the patron's preferences to assist them in selecting items to read. The patron's route is based on a schedule which is selected at the top of the window.


Circulation > Reading Preferences
Schedule Date From 03/13/2013 To 03/13/2013 Search
First Name Last Name Phone No
Mark Rothko 7802336785
Title Call No Barcode Author Subject Status
1 7th heaven. 230.56 CH L0001000002371 Fiction te In
2 Arthur's fire dr E BRO L0001123107155 Brown, Ma Arthur (F In
3 Arthur's valent E BRO BR(L0001000000111 Brown, Ma Valentin(Out
4 Arthur's valent E BRO BR(L0001000000112 Brown, Ma Valentin(In
5 Cover of snow FIC00800(L0001000006459 Milchman, Widows- In
6 D.W. rides aga E BRO L0001000001136 Brown, Ma Bicycles In
7 D.W., the picky E BRO L0001000000809 Brown, Ma Food hab In
8 Dare to be sca FIC SAN L0001000000251 San Souci, Horror ta In
9 Dinosaurs alive science61: L0001000001531 Brown, La Children In
10 Dinosaurs divo 306.8 BRC L0001000000164 Brown, La Divorce; In
11 Fables Aesop n E KRA L0001000000179 Kraus, Rob Fables; (In
12 Freckle juice FIC BLU L0001000001800 Blume, Ju Children' In
13 Freckle juice FIC BLU L0001000001801 Blume, Ju Children' In
14 Friends : Snak FIC COW 30130911000100 Cowley, Jc Snakes-- In
15 Harry Potter ar FIC ROW L0001000002358 Rowling, J Magic - F In
Check Out Preview Checkout Receipt Show Me Close

1. Click **Circulation > Reading Preferences**.
2. System lists patrons on left and recommended books for check out on the route's scheduled date on the right.
3. Select the books to be checked out and click Checkout.
4. Click Checkout Receipt to print a receipt.

Upload Offline Circulation

In the event that the web-based ILS is unavailable then desktop circulation can be employed. The Upload Offline Circulation feature allows circulation done in the desktop circulation system to be brought to the web-based ILS system.

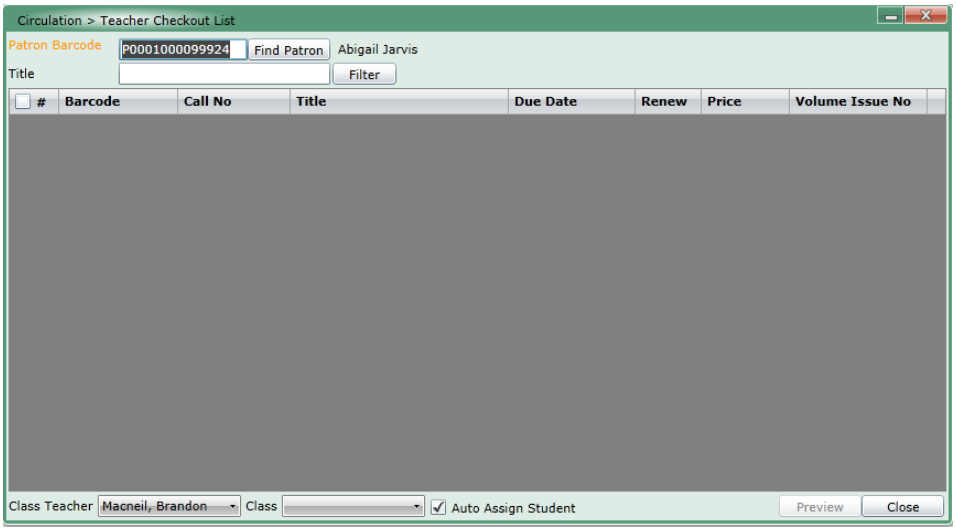
1. Click **Circulation > Upload Offline Circulation**.

Tip: See more on Offline Circulation in the **Offline Circulation Module**.

Teacher Checkout List

The Teacher Checkout List feature enables for class sets of items to be transferred between classes and/or teachers.

1. Click **Circulation > Teacher Checkout List**.
2. Input the patron's barcode.
3. All items checked to patron will appear.
4. Filter by title to limit the transfer to a class set of items.
5. Click Filter.
6. Select the items to transfer.
7. Select the Class Teacher and Class to transfer the items to.
8. If the Auto Assign checkbox is checked then the items will be assigned to the students in the selected class.
9. Click Preview to apply the changes and print the list.



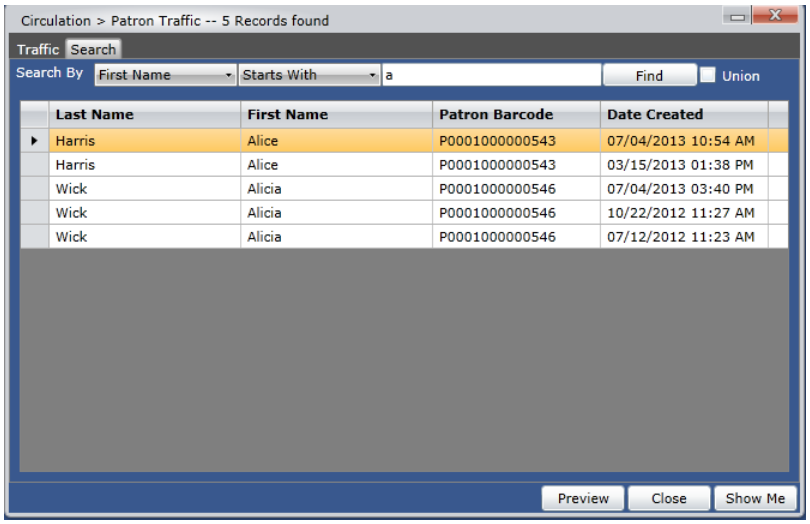
Patron Traffic

Patron traffic tracks how often each patron visits the library. This can be displayed on an annual report.

Traffic

Enter the time when a patron enters the library by scanning their patron barcode.

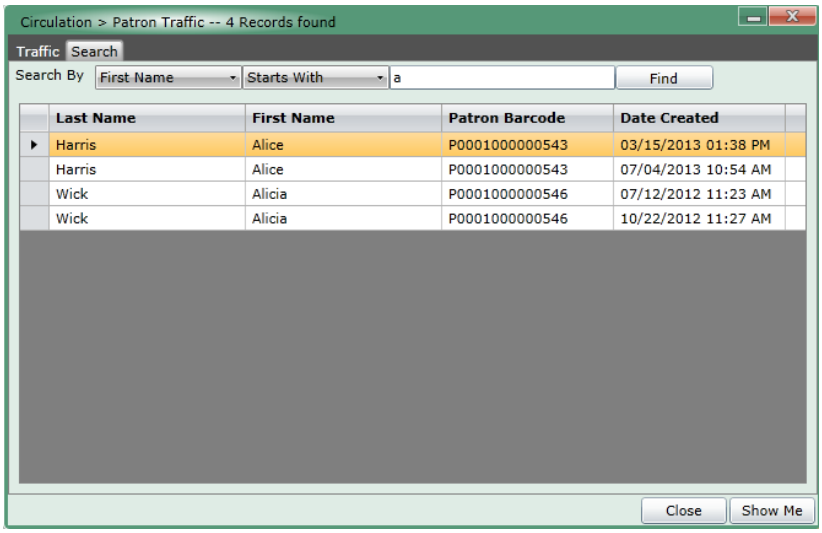
1. Click **Circulation > Patron Tracking > Patron Traffic**.
2. Enter the patron barcode in the Traffic tab and press Enter.
3. The screen will display a welcome message to the patron.



Search

See the times when a patron has entered the library.

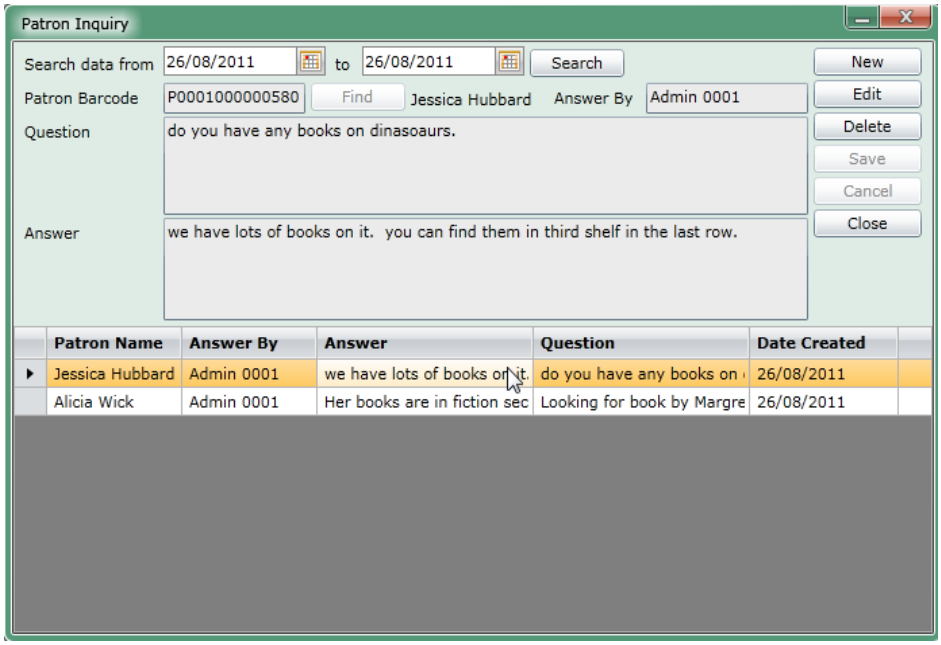
1. Search for the patron's name, barcode, or the date the record was created.
2. Click Find to see the times when the patron entered the library.



Patron Inquiry

Patron inquiries are requests for help from the library and can be tracked and displayed in an annual report.

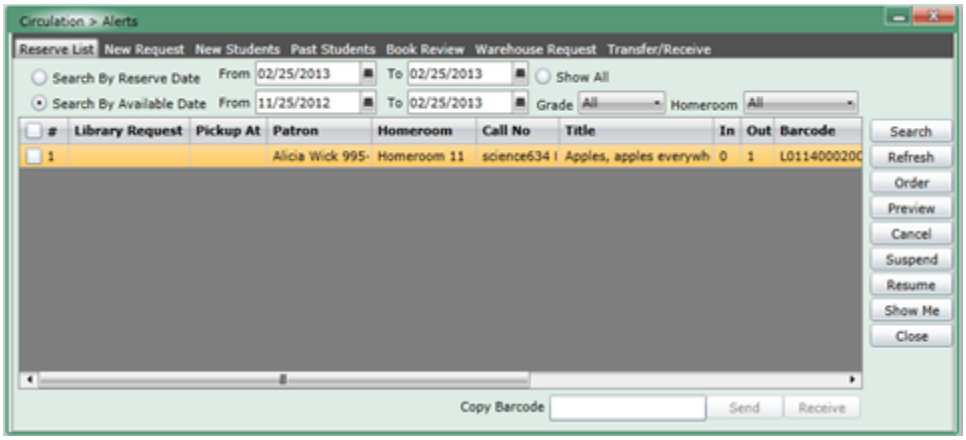
1. Click menu **Circulation > Patron Tracking > Patron Inquiry**.
2. Click New.
3. Enter the patron barcode or enter the name of the patron.
4. Enter the question the patron asked.
5. Enter the answer give to the patron.
6. Click Save.
7. Specify the date range and click Search to view the history of patron inquiries for a given date.



Alerts

When the alert feature is enabled, alerts will appear when logging into ILS. The Reserve List and newly Registered Patrons from the OPAC (or the SIS for school libraries) will be displayed in different tabs. The following image

shows an alert list.



Reserve List

Reserve List previews the list of reserves that have come in from patrons and allows the librarian to suspend the reserve, which takes the reserve out of the queue temporarily. It also allows the librarian to cancel the reserve which removes the patron from the reserve queue completely and resume a previous suspended reserve, which puts the patron's reserve back in the same spot of the queue from when they initially requested the book.

New Request

New Request lists all of the entries of books the library could potentially order submitted through the OPAC from patrons.

New Students

New Students lists all of the students who have moved to different library sites recently.

Past Students

Past Students will alert librarians of students who have recently left the district.

Book Review

Book Review will allow librarians to review, modify, cancel, or post reviews submitted from patrons through the OPAC.

Request/Transfer

Request/Transfer shows a list of requested textbooks to be sent to the warehouse and the user that submitted this request.

Transfer/Receive

Transfer/Receive shows a list of requested textbooks to be sent to your library from another library and the user that submitted this request.

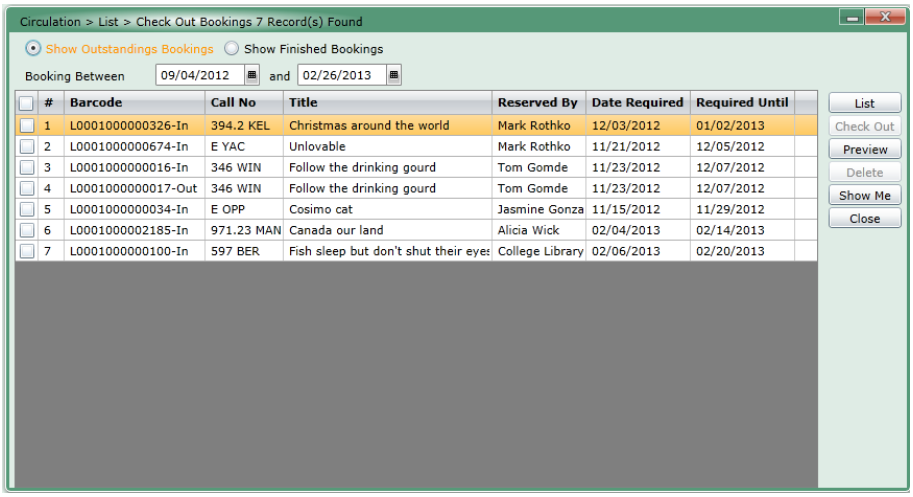
Lists

There are three lists available in the Circulation Module. These lists are: Booking, Reserve, and Temporary list.

Booking List

The booking list displays the number of bookings in circulation for a specific time period.

1. Click **Circulation > List > Booking**.
2. Select Outstanding Bookings or Finished Bookings.
3. Select the booking dates to be listed.
4. Select the check boxes beside the barcodes to check out or delete entries for Outstanding Books. Select Finished Bookings for deletion only.
5. Click List.



#	Barcode	Call No	Title	Reserved By	Date Required	Required Until
1	L0001000000326-In	394.2 KEL	Christmas around the world	Mark Rothko	12/03/2012	01/02/2013
2	L0001000000674-In	E YAC	Unlovable	Mark Rothko	11/21/2012	12/05/2012
3	L0001000000016-In	346 WIN	Follow the drinking gourd	Tom Gomde	11/23/2012	12/07/2012
4	L0001000000017-Out	346 WIN	Follow the drinking gourd	Tom Gomde	11/23/2012	12/07/2012
5	L0001000000034-In	E OPP	Cosimo cat	Jasmine Gonza	11/15/2012	11/29/2012
6	L0001000002185-In	971.23 MAN	Canada our land	Alicia Wick	02/04/2013	02/14/2013
7	L0001000000100-In	597 BER	Fish sleep but don't shut their eyes	College Library	02/06/2013	02/20/2013

Reserve List

The Reserve List displays the all of the reserves for specific dates. Reserves can also be reordered and deleted from this window.

Search

1. Click **Circulation > List > Reserve List**.
2. Select by reserve date, available date, or show all.
3. Select a date range.
4. Limit by grade or homeroom if needed.
5. Then click Search.

Move Up/Move Down

1. Click **Circulation > List > Reserve List**.
2. Click the reserve record to change.
3. Click Order.
4. Click the reserve record to order.
5. Use the Move up and Move down buttons to reorder selected reserve.

Suspend

Suspend will take the item out of the reserve queue for the reserve temporarily.

1. Click **Circulation > Lists >Reserve List**.
2. Click the left-hand checkbox of the record you will suspend.
3. Click Suspend to temporarily remove item from the reserve queue.
4. Suspended items will show in red on the reserve list.

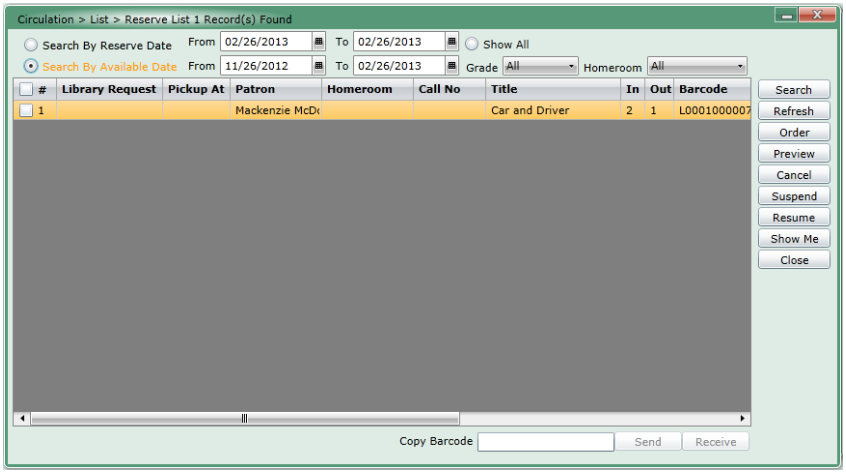
Resume

Resume will put the item back in the same place in the reserve queue before clicking Suspend.

1. Click **Circulation > Lists > Reserve List**.
2. Click the left-hand checkbox of the record you will resume (items with red text).
3. Click Resume to suspended items back into reserve queue. The text will turn black.

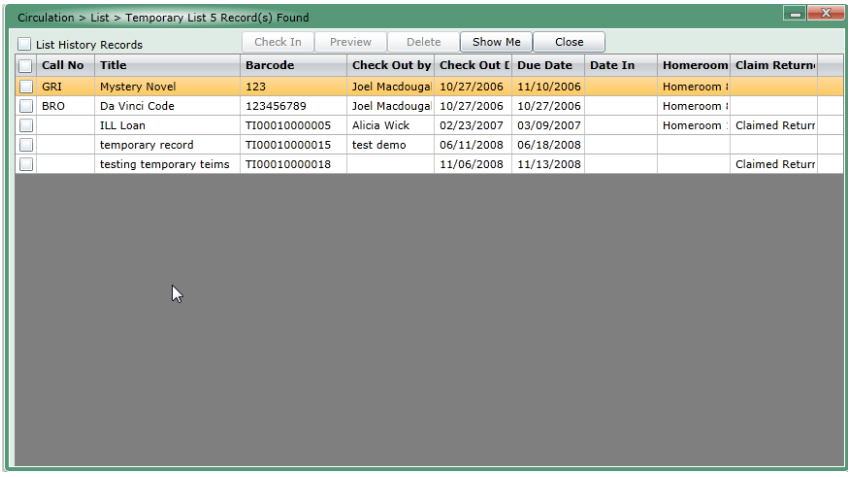
Cancel

1. Click **Circulation > List > Reserve list**.
2. Click the reserve record to cancel.
3. Click Cancel to remove the reserve.



Temporary List

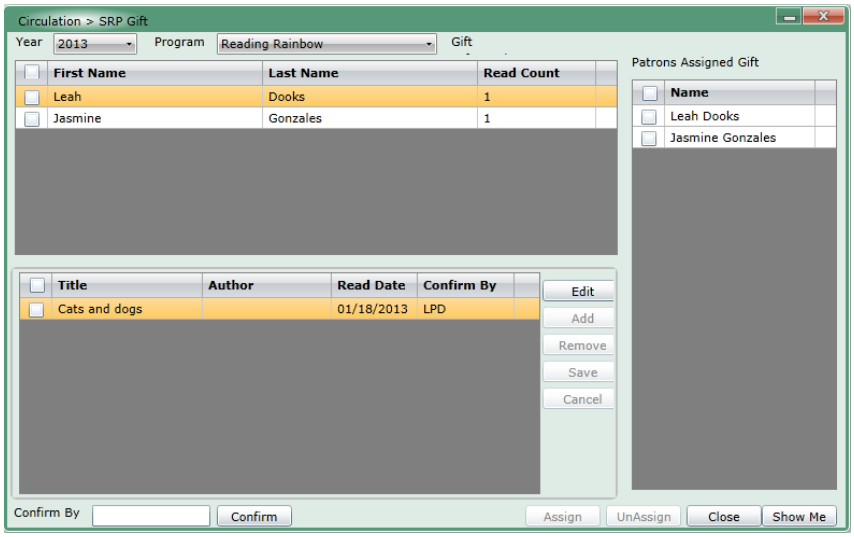
A temporary item is cataloged with minimal information, will circulate once, and upon check in it is deleted from the catalog. Temporary items currently on loan will be listed with the checkout date, the due date, and the name of the patron borrowing the item.


Circulation > List > Temporary List 5 Record(s) Found
List History Records
Check In
Preview
Delete
Show Me
Close
Call No Title Barcode Check Out by Check Out D Due Date Date In Homeroom Claim Return
GRI Mystery Novel 123 Joel Macdouga 10/27/2006 11/10/2006 Homeroom
BRO Da Vinci Code 123456789 Joel Macdouga 10/27/2006 10/27/2006 Homeroom
ILL Loan TI00010000005 Alicia Wick 02/23/2007 03/09/2007 Homeroom Claimed Returr
temporary record TI00010000015 test demo 06/11/2008 06/18/2008
testing temporary teims TI00010000018 11/06/2008 11/13/2008 Claimed Returr

1. Click **Circulation > List > Temporary List**.
2. Select List History Records to view all Temporary Items, not just those in current circulation.
3. Check in a temporary item from this window by selecting it and clicking Check In.
4. Click Delete to remove a temporary item.

SRP Gift

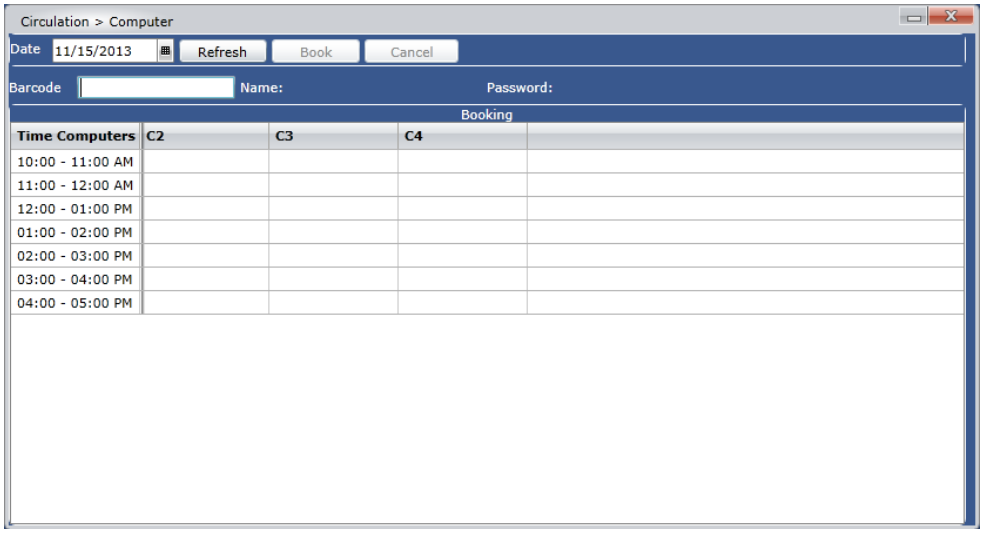
The Summer Reading Program (SRP) Gift feature shows all programs, associated patron read counts, and gifts for patrons who meet the program requirements.



1. Click **Circulation > SRP Gift**.
2. Select a patron.
3. Click Confirm to verify book was read**.**
4. Click Assign to give patron a gift.

Computer Booking

The Computer Booking window allows you to scan the barcode of the patron, type a password, and then book a timeslot for a computer on a specific date.



Catalog Module

The catalog module includes the following features:

1. Cataloging
    a. Find / Add Item
    b. Find / Add Projects
    c. Find / Add Publisher
    d. Find / Add Authority
    e. Book Review
    f. Quick Cataloging
    g. ILL Cataloging
    h. ISBN Cataloging
    i. New From Template
    j. Authority MARC Template
    k. Set MARC Template
    l. New Request
    m. Shelf List
    n. Recommended List
    o. Z39.50
2. Cloud Search
3. Collection Analysis
4. Barcode Spine Label
5. Templates
    a. Bibliographic
    b. Authority
6. Serials
    a. Find / Add Serials
    b. Routing
7. Change
    a. Status
    b. Library
    c. Circ Type
    d. Move Copies
    e. Merge Titles
    f. Copy Subset
    g. Rescan Barcode
8. Global Change
    a. Heading Global Change
    b. Material Type Global Change
    c. Audience Global Change
    d. MARC Global Editor
9. Setting
    a. Keywords Tag Definition
    b. MARC Display Setting
    c. MARC Import Options
    d. Call No Mapping

Cataloging

Insignia Library System provides a variety of methods to catalog items, this includes:

1. The ability to create records using MARC and non-MARC interfaces.
2. The ability to import MARC records using integrated Z39.50 clients.

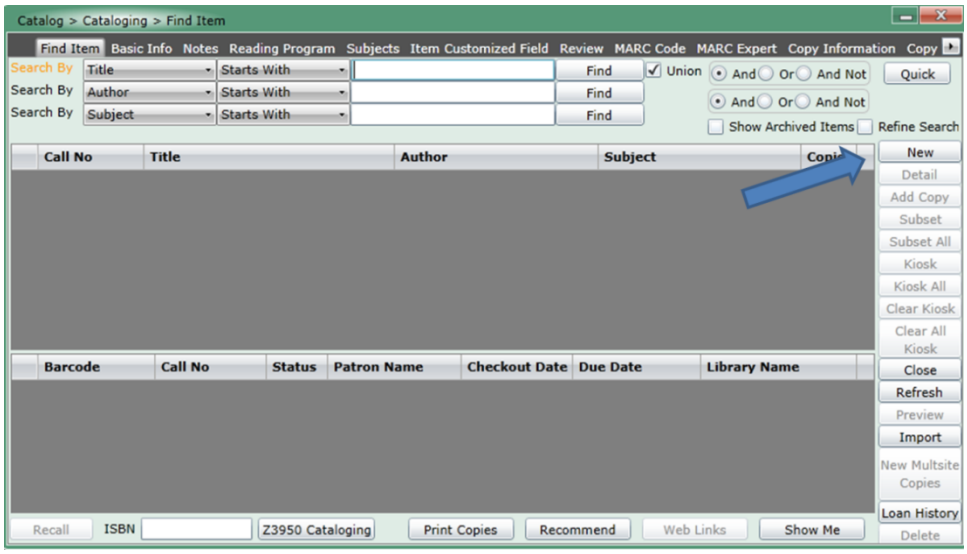
3. The ability to import MARC record from the web or from a file.

ILS comes with the following cataloging interfaces

1. **Non-MARC Cataloging**: This interface provides labeled fields with the MARC tags hidden from the cataloger. The ILS saves the record in MARC format. This interface is useful to those cataloging with little knowledge of MARC fields.
2. **MARC Cataloging:** This interface provides a grid with MARC tags for cataloging. The tags and subfields are selected from the dropdown list but punctuation rules must be input by the cataloger.
3. **MARC Expert Cataloging**: This interface provides the ability to catalog using a notepad like interface. The cataloger must input tags, subfields and punctuation rules.
4. **Quick Cataloging**: A very simple interface to catalog items quickly with minimal tags.
5. **Temporary Cataloging:** This interface enables quick cataloging of items that are automatically deleted upon check in.
6. **Interlibrary Loan (ILL) Cataloging**: This interface allows interlibrary loan items to be cataloged.

Find/Add Item: Basic Information

This interface, the Non-Marc Cataloging Interface, is best for those who do not know MARC cataloging rules. ILS will apply MARC rules for the user.

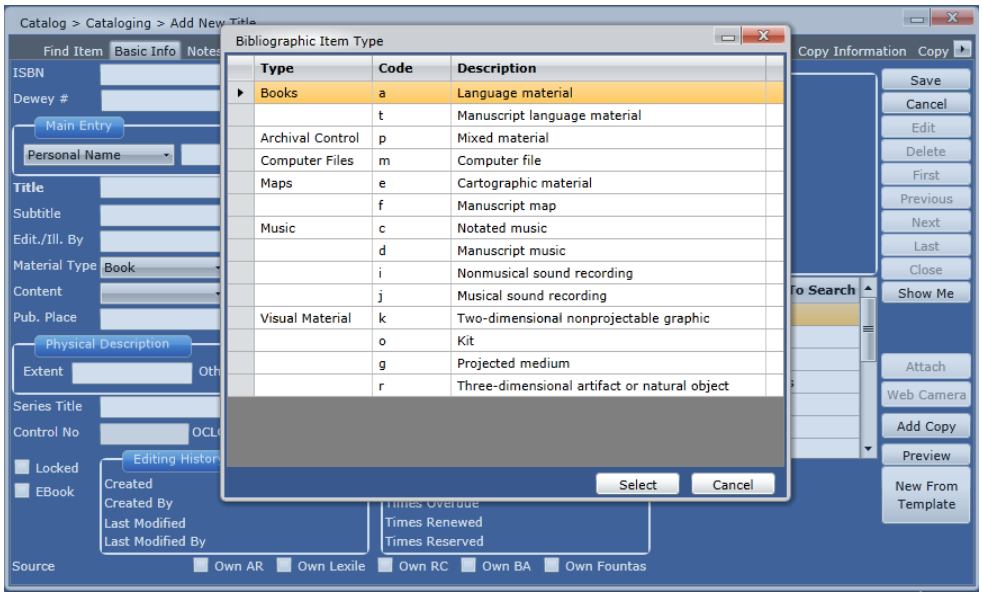


Search

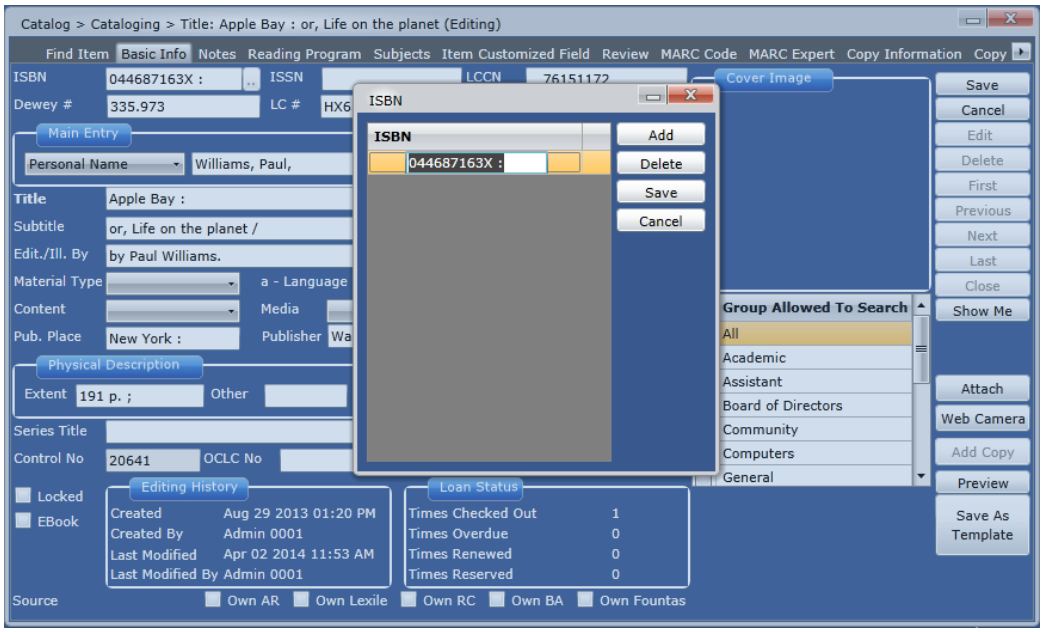
1. Go to **Catalog > Cataloging > Find/Add Item**.
2. Search for the items and copies by any of the available parameters including keyword.
   2.1. When searching by barcode, only the item with that barcode will be returned in the search. Barcodes can be searched by the following criteria: “Starts With”, “Exact Match”, and “Ends With”.
      2.1.1. To use the “Ends With” search, please see the Catalog Configuration’s Barcode Format Section and make sure that “Copy Quick Barcode” is checked.

New

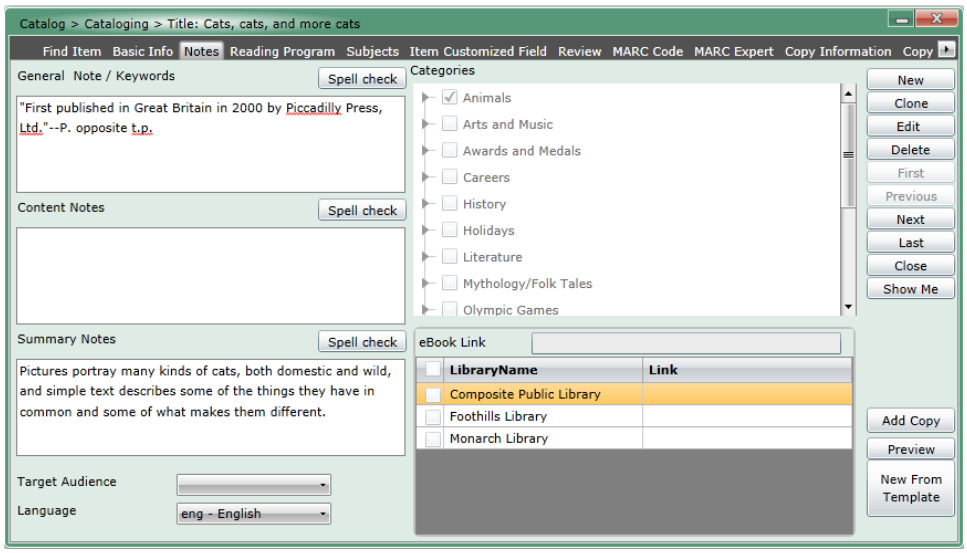
1. Click Catalog > Cataloging > Find/Add Item.
2. Cataloging a New item
   2.1. Select New.
   2.2. To modify existing title find the title and click Edit.
3. Select the format of the record being cataloged in the following image.



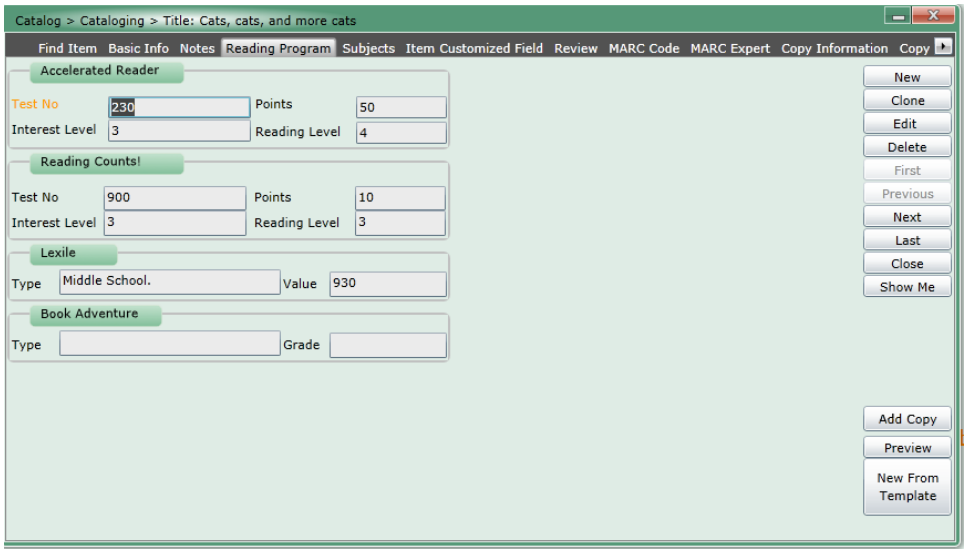
4. A drop-down list will appear for data which is considered authority data, such as the Main Entry.
5. To enter multiple ISBN, click ... . Enter the ISBNs clicking Add after every entry. When all ISBNs are added, click Save.
6. Enter a call number. When the call no is changed, the system will prompt to change all call no copies for that item and allow the library to reprint them. This permission is set under **Configuration > Catalog**.

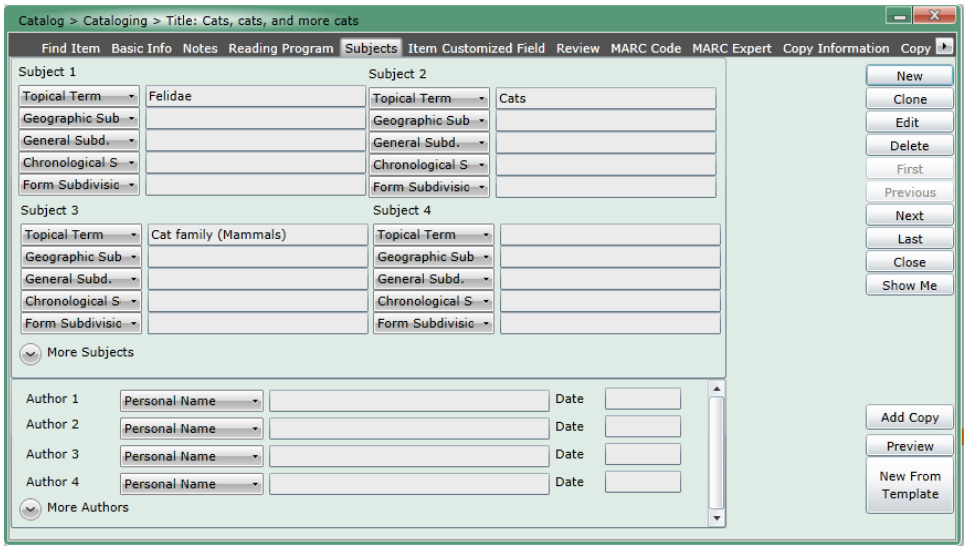


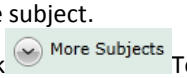
1. Select a material type and collection type from the dropdown menus.
2. If you're cataloging an RDA record, add the following fields and leave material type blank: Content, Media, and Carrier.
3. Input a call number in the top right hand field that can be taken from any classification system.
4. Fill in the provided fields, i.e. Title, Subtitle, and Pub. Place… etc.
5. Check the following checkboxes, if applicable:
   5.1. Digital: controls the digital content rights (i.e. audio or video files) such as a number of times an item can be accessed within a specific time period
   5.2. Non-Searchable: item is not searchable from the OPAC but not the catalog interface
   5.3. Incomplete: marks the item as incomplete and will prompt to finish cataloging process after the item is checked in from its first loan
   5.4. Locked: item is not modifiable in the import process, the Z39.50, or in a Union search from another library site number
   5.5. eBook: turns on settings for eBooks
   5.6. Own Lexile; Own RC; Own BA; Own Fountas: This will display the Reading Programs tab within the program to update Reading Program information.
6. Select the Groups Allowed To Search from the patron groups listed to restrict searching in the OPAC from specific patron groups.
7. Click Notes tab, this screen allows the user to add additional information about the item.



8. General Notes (Tag 500): Any information with no specific tag.
9. Content Notes (Tag 505): Titles of separate works or parts of an item or the table of contents.
10. Summary Notes (tag 520): Unformatted information that describes the scope and general contents of the materials. This could be a summary, abstract, annotation, review, or only a phrase describing the material.
11. eBook Link (Tag 856): Enter a link for an electronic resource. This resource will comply with its copyright license by limiting the number of people who can view them online. These tags have spell check enabled.
12. Select Target Audience and the Language.
13. In the Kiosk Categories list on the right side of the screen, check the checkboxes next to the categories into which this item should be linked.
    13.1. Selecting a broader category does not link the item to the narrower categories in the hierarchy. Ensure that all categories of the Kiosk are selected that the item record should appear in.
14. Enter reading program information click the reading program tab. Enter the data for the required program.
15. Values can be added for Accelerated Reader, Reading Counts, Lexile, and Fountas reading programs. This is visible only if it is enabled in **Administration > Library Setting > Configuration** and catalog tab. Further, this information can be imported on a regular basis. Please contact Insignia on how this process can be done.
16. Enter additional authors and subject headings in the Subjects Tab.



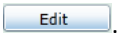


17. To specify subjects, select the appropriate subject subfields from the dropdown list on the left or leave the default one, and enter the subject.
18. To add more than 4 , click 

To specify authors, pick the author subfields from the dropdown on the left or use the default, and enter the author (last name, first name) and then date of birth (optional). While typing in fields, a dropdown of existing authors will appear for selection. Continue typing to create new fields in the system.
19. To add more than 4, click

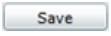
20. Ensure record is saved and copies have been added to the record.

Attach

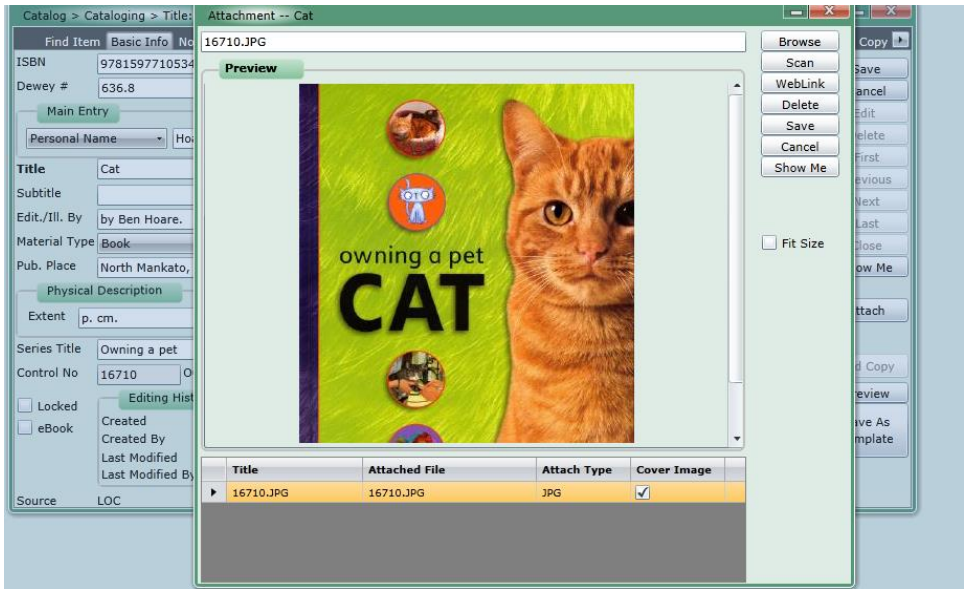
1. Find the appropriate MARC record using the search features in **Catalog > Find/Add Item.**
2. Double click the record on the grid.
3. Click 

.
4. Click

.
5. From this window, files can be attached by locating them in a folder, scanning them into the system, or linking them to the record via Web Link.
6. If it is a file, click

and select the file.
7. Click Open.
8. In the grid below, specify the title.
9. If file being attached is a graphical file and it is to be the default cover image in OPAC, select Cover Image checkbox.
10. If a web link is to be added click Web Link and enter the URL.
11. Enter the title and the URL in the grid below.
12. Repeat above steps to attach more file or links.
13. Click 

.



Groups Allowed to Search

1. Find the MARC record with search features in **Catalog > Find/Add Item.**
2. Double click the record on the grid.
3. Click Edit.
4. Select the groups allowed to view the item in the grid below.
5. When the record is complete, click Save.

Notes

Notes leaves information on cataloging records, including information related to e-books and kiosks.

1. Click **Catalog > Find/Add Item > Notes**.
2. Click New.
3. To add new general notes or keywords, click General Notes/Keywords textbox.
4. To add new content notes, click Content Notes textbox.
    a. Books checked out will have a pop-up message.
    b. The same message will show in red when the book becomes checked in.
5. To add new summary notes, click Summary Notes textbox.
6. Select the target audience and language from the drop down menus.
7. Add item record to preset Kiosk Categories.
8. Add a licensed e-book link in the textbox eBook Link.
9. Add eBook links to the different library districts in the box below.
10. When the record is complete, click Save.

Item Customized Field

Add customized fields that can be added as search by criteria in the Find/Add Item window.

1. Click **Catalog > Cataloging > Find/Add Item**.
2. Search and select the title.
3. Click Item Customized Field.
4. Click New.
5. Add text to the custom field.
6. Click Save.

Note: Customize item fields in the Custom Setting section of the Admin All profile.

Review

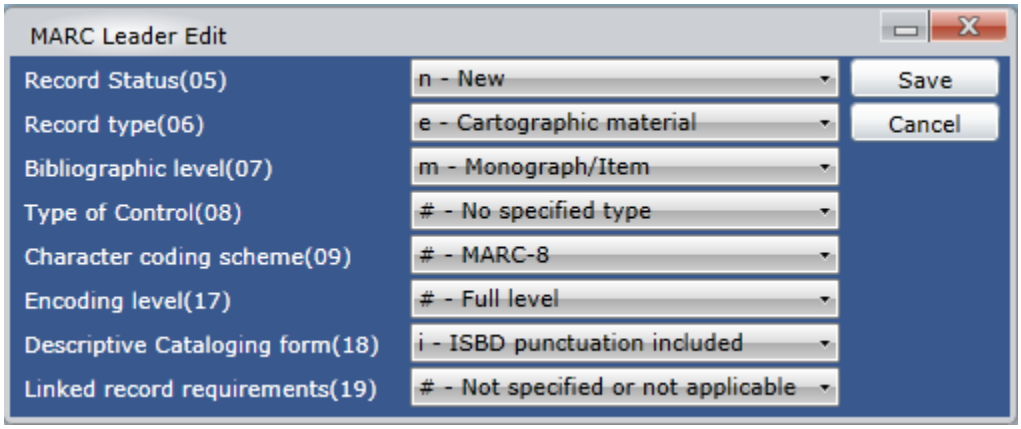
Reviews submitted by patrons can be populated in the OPAC.

1. Click **Catalog > Cataloging > Find/Add Item**.
2. Search and select the title.
3. Click Review tab.
4. Click Approve to approve it.
5. Click Edit to modify the content and then click Save.
6. Click Disapprove to delete review.

MARC Code

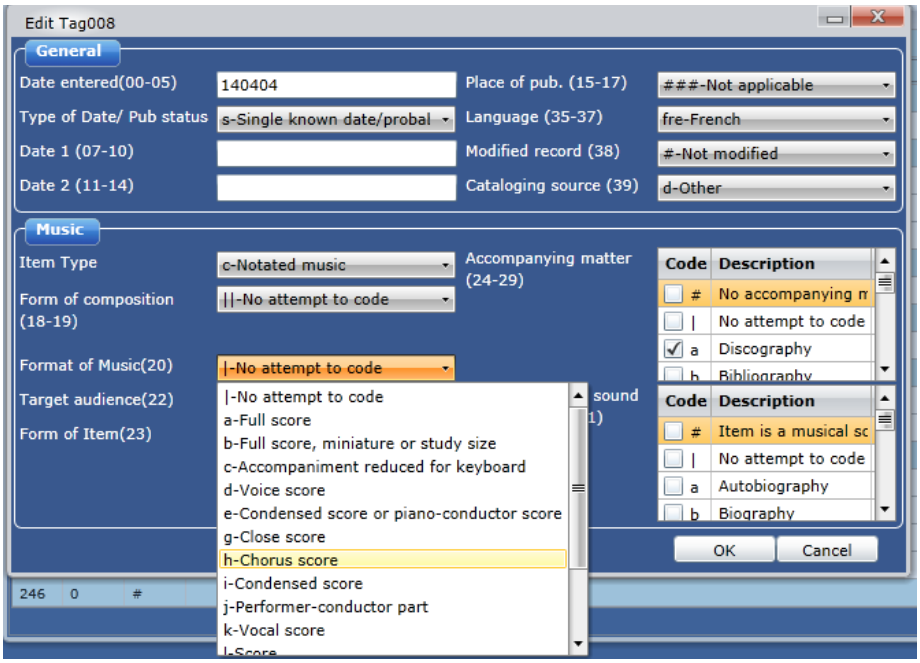
MARC interface allows optimal control over MARC tags.

1. Click Catalog > Find/Add Item > MARC Code.
2. Click New.
   a. Place the cursor and click in the value field corresponding to the MARC tag and subfield to enter the desired information. Double-clicking the 000 tag will give you the "MARC Leader Edit" window:



Note: Position 18 can be set to "I" to designate an RDA type record.

   b. Double-click the 008 tag to edit it from this menu which varies according to the bibliographic item type selected:



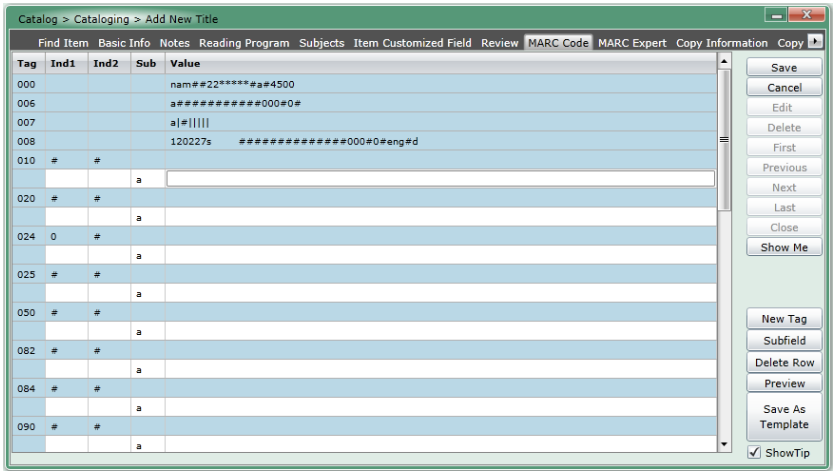
Note that tags h, I, and j are available in position 20 tag 008 when position 000 in tag 007 is set to c, Notated Music according to RDA standards.

3. Selecting ShowTip checkbox will enable popup tips to appear when the cursor is on a tag or subfield.
4. To add a New tag, click New Tag.
5. Select the tag and click OK.

Note: Insignia now includes several new tags and tags changed by RDA.

6. To add a sub field, select the tag and click Subfield.
7. Select the subfield(s) and click OK.
8. Click on the row and click Delete Row to delete tags and subfields.
9. When finished, click Save.
10. By clicking Save As Template, MARC templates can be named and saved for future use.

Tip: Web sites can also be linked to a title from Find/Add item. Search for a title and click Web Links, enter the URL and press enter.

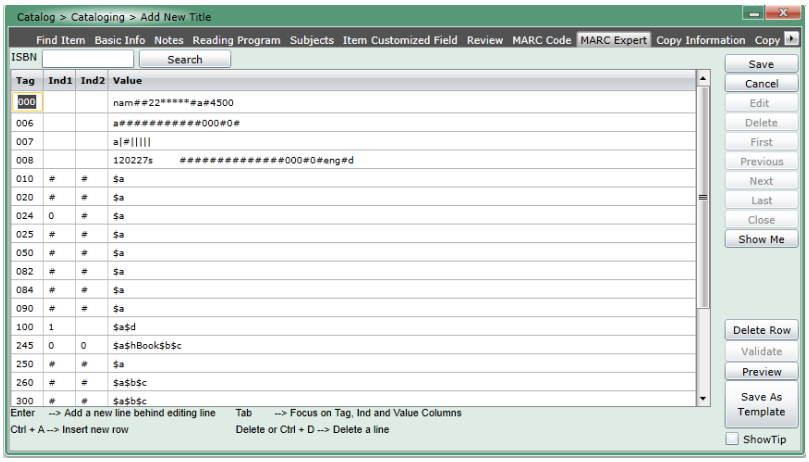


MARC Expert

MARC Expert Interface is recommended for users wanting full control of their records. This interface requires the cataloger to have an in-depth knowledge of MARC cataloging rules, including all tags, subfields, and punctuation.

1. Click **Catalog > Find/Add Item > MARC Expert**.
2. Click New.
3. Enter information into fields.
4. To add a new tag, go to the value of any tag and press Enter twice.
5. To delete a tag select the tag row and click Delete Row.
6. To validate, select the record and click Validate.
7. Click Save when the record is complete.

Tip: Records can be imported from Z39.50 hosts using the ISBN field and clicking search. The records can easily be edited once imported in this screen.



Copy Customized Fields

Add customized fields that can be added as search by criteria in the Find/Add Item window.

1. Click **Catalog > Cataloging > Find/Add Item**.
2. Search and select the copy.
3. Click Copy Customized Field.
4. Click New.
5. Add text to the custom field.
6. Click Save.

Note: Customize copy fields in the Custom Setting section of the Admin All profile.

Notes History

View the history of notes that has become recorded on an item's record using this tab.

1. Click **Catalog > Cataloging > Find/Add Item**.
2. Search and select the copy.
3. Click Notes History.
4. View the Copy Barcode, Date Time, Created By, and Notes.

Find/Add Item Window Features

This window is accessed through **Catalog > Cataloging > Find/Add Item.** The Find/Add Item Window is a very powerful window enabling the user to do many cataloging tasks without having to navigate to other windows in

ILS. Search Digital, Non-Searchable, eBook, and Incomplete items by selecting any of those terms in the Find/Add item dropdown.

Delete an Item

1. Go to **Catalog > Cataloging > Find/Add Item**.
2. Locate the item record using the search tools.
3. Once the item appears in the grid, select the item and click Delete.
4. It will then tell you how many copies are under that record and request a confirmation to delete.
5. Clicking ok to confirm delete will remove the item and all attached copies.

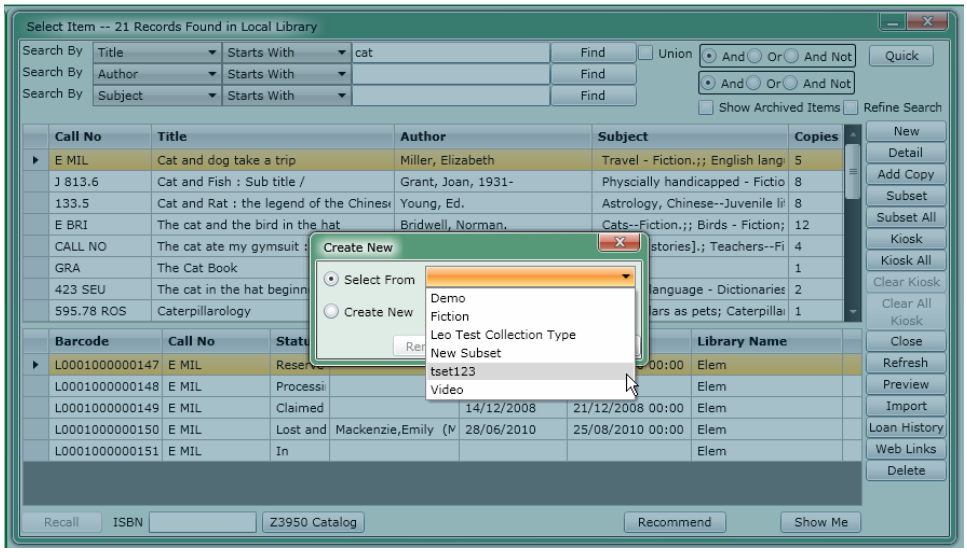
Delete a Copy

1. Go to **Catalog > Cataloging > Find/Add Item**.
2. Look up the item you would like to delete.
3. Click the item when it appears in the first grid.
4. Select this item record.
5. In the second grid where the barcode is listed double click the copy to delete.
6. Double click this barcode and you will be taken to the copy information tab and that copy barcode should be listed.
7. Click Delete to the right to remove that copy.
8. Confirm the delete.
9. If you do not want to delete all the copies, click Cancel.

Subset

A Subset can be used to group together different items that need to be processed together. For example, subsets can be useful in generating reports or making global changes.

1. Click **Catalog > Cataloging > Find/Add Item**.
2. Search for the items to be added to the subset.
3. Click Subset All if all items on the list are to be added to the Subset.
4. Individual or multiple records can be selected by right clicking on each item.
5. Selected rows will appear highlighted and click Subset.
6. Select an existing subset or Create New one, Click OK.

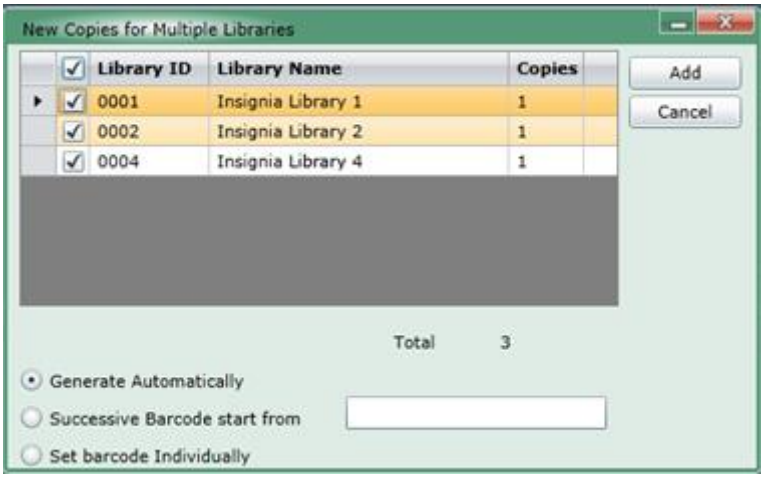


Kiosk

1. Click **Catalog > Cataloging > Find/Add Item**.
2. Search for the items to be added to a Kiosk Category
3. Click Kiosk All if all the items on the list to be added to a Kiosk Category or click Kiosk to just add the selected item to a Kiosk Category.

Clear Kiosk

1. Click **Catalog > Cataloging > Find/Add Item.**
2. Search for the Kiosk Category from search by Kiosk Category.
3. Click Clear All Kiosk to clear all the items from the Kiosk Category.
4. To remove certain items from a Kiosk category, highlight them and click Clear Kiosk.



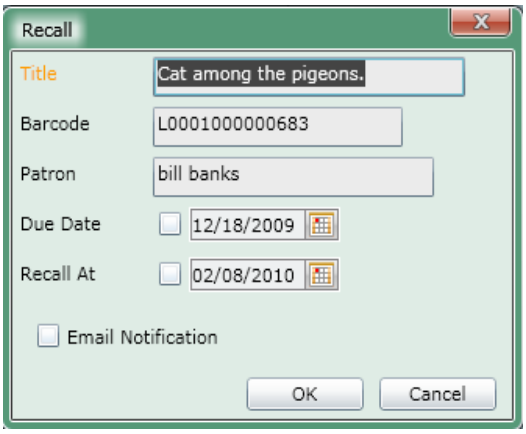
Import

Selecting Import will open the import window that enables records to be imported.

New Multisite Copies

The New Multisite Copies button allows the cataloger to add copies to multiple libraries within a union.

1. Click **Catalog > Cataloging > Find/Add Item.**
2. Locate the item record using the search tools and select it.
3. Click New Multisite Copies.
4. Check the library or libraries who need to add copies.
5. Select the appropriate barcode.
6. Click Add.
7. Edit any copy information.
8. Click Save.



Web Links

This button enables web sites to be linked to selected titles. To remove a web link, click Edit for the MARC record and then click Attachment to remove the links. Dead links can also be removed from the record, please contact Insignia to enable this feature.

Loan History

Loan History displays the Loan History for the selected title.

Print Copies

Print Copies will print all copies listed for the selected title.

Z39.50

This button enables quick cataloging by searching the default Z39.50 hosts. To use this feature, enter the ISBN number in the field and click the Catalog Button. If a record is found, a prompt will appear confirming that the item has been cataloged.

Recall

The Recall button is used to recall checked out items in the library before their current due date. This is best used when an item needs to be returned prior to the due date. These recall values are set in **Administration > Library Setting > Circulation Types > Item Circulation Type** set up of the program.

1. Click **Catalog > Cataloging > Find/Add Item**.
2. Search and select the title.
3. Select the copy record to be recalled.
4. Click Recall.
5. Select the Due Date and Recall Dates.
6. Select Email notification to send an email to the patron borrowing the item.
7. Click OK.

Recommended List

This feature enables items to appear in the OPAC under the Recommended tab.

1. Click **Catalog > Cataloging > Find/Add Item**.
2. Search for the item to add to the Recommended List.
3. Click the record of the recommended item in the grid.
4. Click Recommend and confirm the selection.

Tip: To remove items from the Recommended list use the Recommended window located under **Catalog > Cataloging > Recommended**.

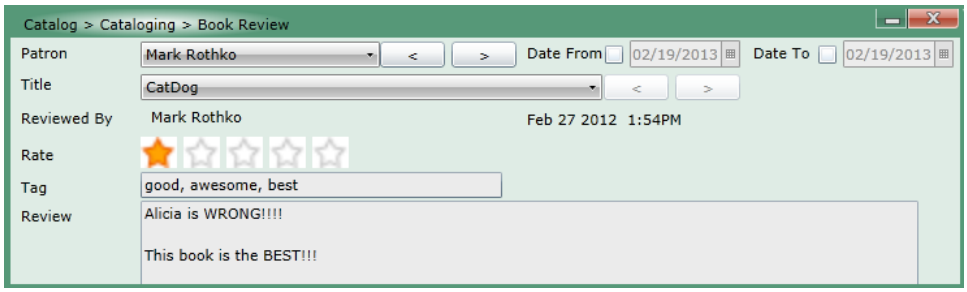
Archived Items

This feature is enabled in **Administration > System Setting > Custom Setting**, then set the value for Archive Item = 1. (The user must be logged in as the admin to view or modify this setting.) The Item Archive feature enables users to archive items when deleting instead of destroying them. To see the list of Archived Items go to the menu **Catalog > Cataloging > Find/Add item**. Select the Archive checkbox, now when search is done it will be done on archive items.

Book Reviews

Book reviews can be added into the library system. The reviews must first go through an approval process. Once the review is approved, the review will display in the OPAC when the reviewed item is searched. There are two ways to approve a book review.

1. Click **Catalog > Cataloging > Book Review**.
2. Pick a title from dropdown list or click < to view previous book reviews.
3. Click Approve.
4. Click Edit to modify the content and then click Save.
5. Click Approve to approve the book review.
6. To disapprove the reviews, click Disapprove.
7. Repeat above steps for other titles by selecting one from the dropdown list.



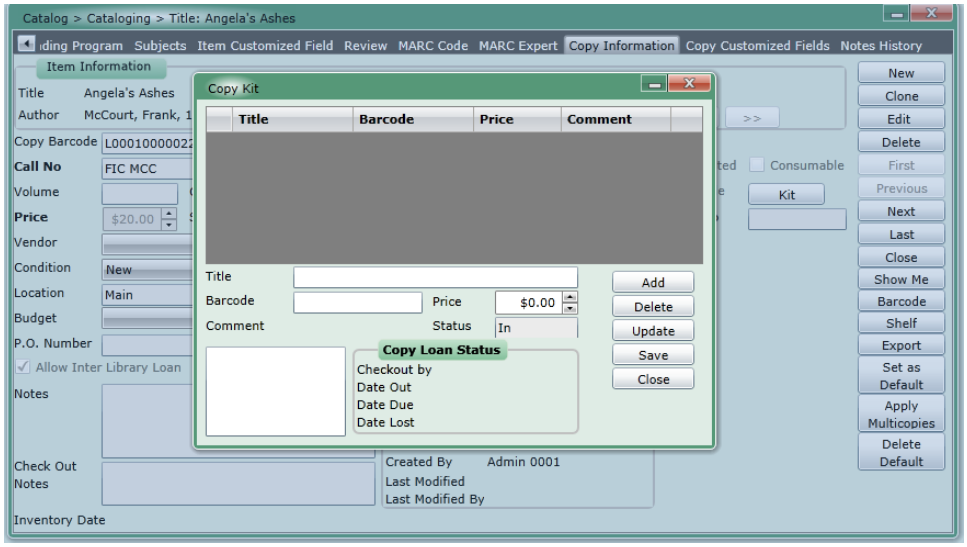
Adding Copy Information and Copy Information Window Features

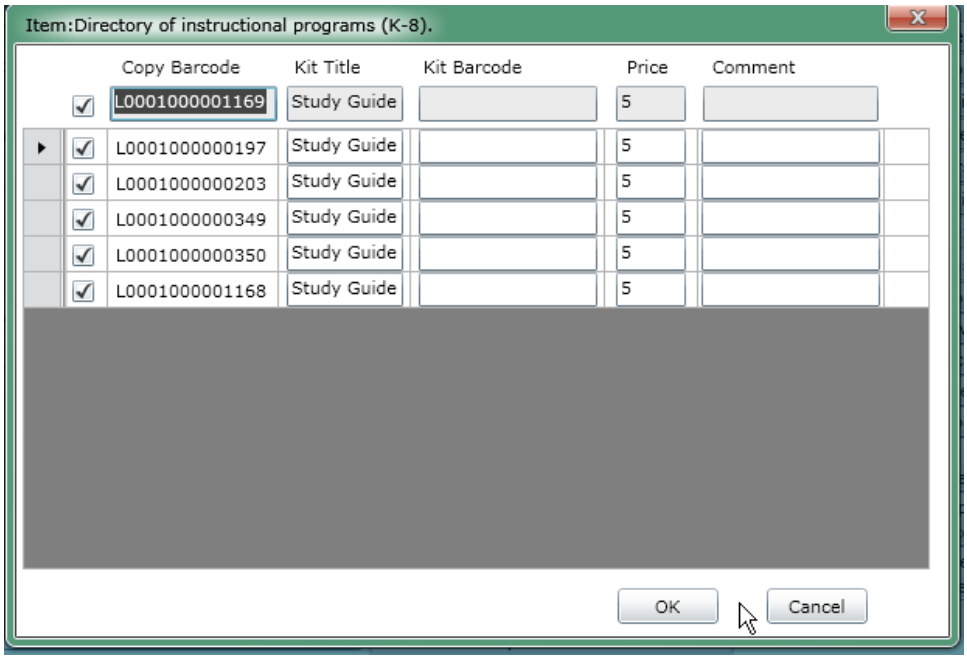
1. Find the title by clicking on Catalog > Cataloging > Find/Add Item.
2. Select the item and click Add Copy.
3. Enter the number of copies user want to add and click OK.
4. Specify the barcode(s) or allow the system to generate the barcode(s). When adding more than one copy, the Set Barcode screen will appear with these options, on how to generate barcodes:
    a. Generate Automatically.
    b. Successive Barcodes Start From: Adding from a given number.
    c. Set Barcode Individually: Specify each barcode to be added.
5. Enter all the information available. The most important copy information to include is the Call No, Circulation Type, and the Price
6. If an item is donated, select the Donated checkbox to track it. If this item is allowed for ILL, select the Allow Interlibrary Loan checkbox.
7. If a copy is to be deleted from the catalog upon check-out click the consumable. This selection marks the copy record as consumable. Consumables can also be scanned by ISBN.
8. To make the copy visible in the OPAC ensure the visible checkbox is checked.
9. Click Save when the copy information is complete.

Kit

If an item has extras, such as a CD or a study guide these can be tracked in circulation by being added to the copy information as a kit.

1. Click **Catalog > Find/Add Item > Copy Information**.
2. Click Kit.
3. Enter the Title of the extra items, the barcode, price, status, and any comments.
4. Click Add.
5. A popup message will appear, prompting if these ancillary items need to be applied to all the existing copies.
6. Specify the copies to which these items are to be added and click OK.
7. Click Save when the kit information is complete.





Relink Barcode

If an item is linked incorrectly to a record, the relink button allows the user to link the barcodes to the correct title. This button is used when a barcode is on the wrong item. Any barcodes used to relink, must exist in the system. This feature is best used when the barcodes are linked to the incorrect items.

Rebarcode

To assign a new automatically generated barcode, click the rebarcode button and the next available barcode will be assigned.

Clone

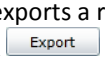
The cloning button enables a record to be copied. This is useful if one record is very similar to another record. This saves time because the user only has to edit the fields that are different between the records.

Barcode

Click the Barcode button on the right side of the window to print barcodes or spine labels. This button opens the Barcode/Spine Labels window. This will automatically limit the range of barcodes to be printed to the single item selected. Choose the required layout and print the barcode label for this copy.

Export

This feature exports a record to a file. To export record of a copy:

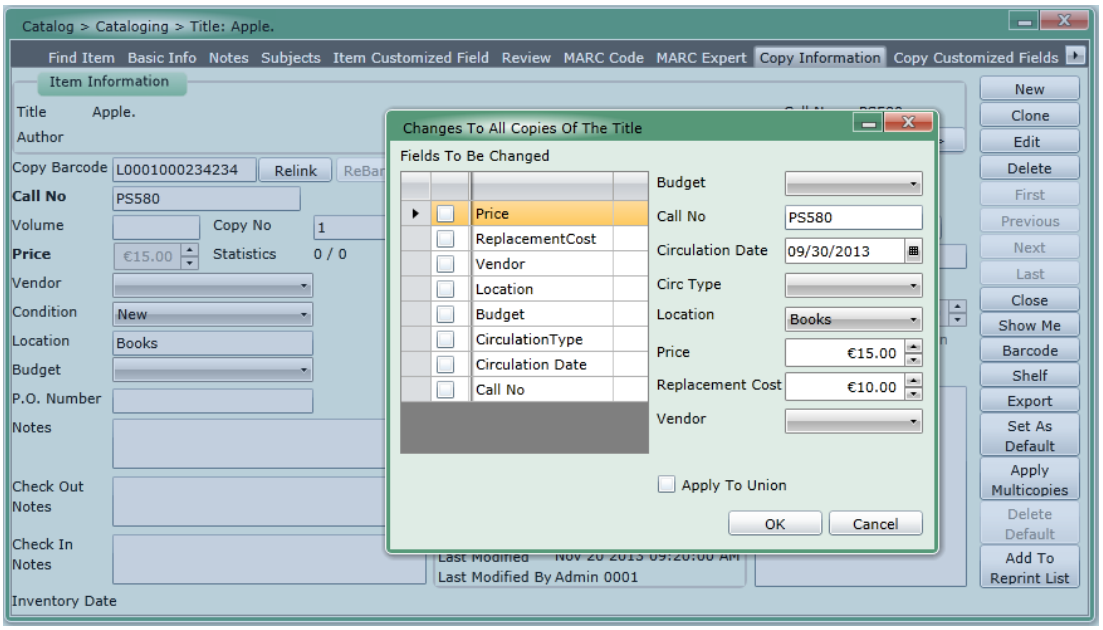
1. Click 

on the right side of the Copy Information window.
2. This will open Export screen and allows the selected record of a copy to be exported.
3. Multiple copies or other relevant information can be exported to a file by specifying different criteria in the export screen.

Tip: The cloning button will also clone cover images from the book.

Apply to Multicopies

By clicking on the Apply Multicopies button from the Copy Information window, changes can be made to a copy record that have multiple copies attached, automatically changing all copy records attached to the title. This feature avoids having to make changes to each individual copy.



1. Click **Catalog > Cataloging > Find/Add Item**.
2. Locate the record using the search tools.
3. Click Copy Information tab.
4. Click Apply Multicopies.
5. Select the checkbox for the fields to be changed and specify the value for each field.
6. To apply the changes to all copies in the Union, select Apply to Union.
7. Click Save.

Set As Default

Set default values for a copy record by finding the copy record and clicking Set As Default. Any New copy added to any title will have the default values applied. If you set the copy as a default, the Delete Default button will become active and you may delete the Default.

Add To Reprint List

Create a list that registers changes in to the barcode and/or call number in the Copy Information for the Barcode/Spine Label window.

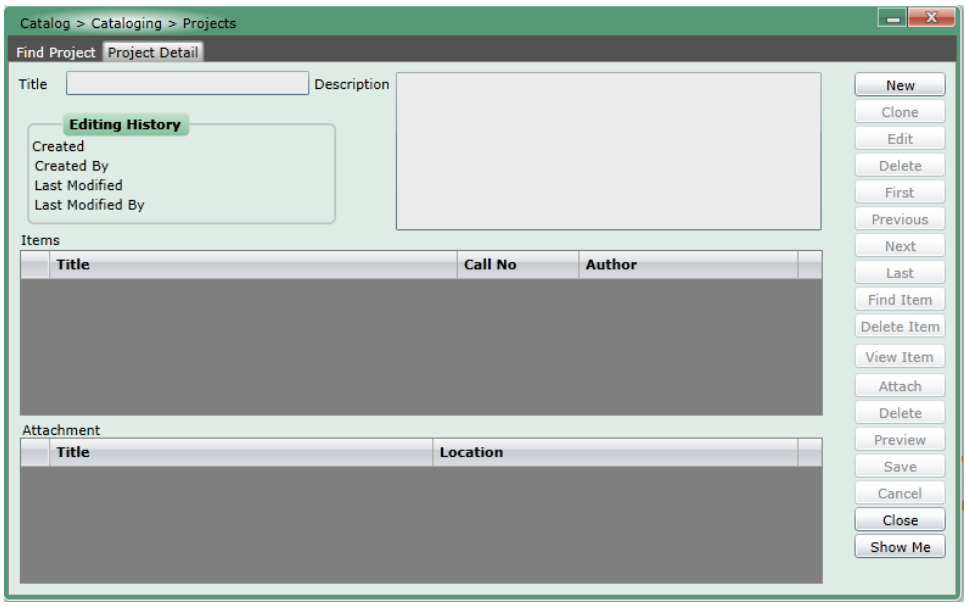
1. Click **Catalog > Cataloging > Find/Add Item**.
2. Locate the record using the search tools.
3. Click Copy Information tab.
4. Click Edit to modify the barcode and/or the copy call number and then click Save.
5. Click Add To Reprint List.

Note: Click the checkbox “Changed Call #” in the Barcode/Spine Label window to generate this list of barcodes. See more information in the Barcode/Spine Label section.

Find/Add Projects

ILS allows for the creation of projects. In a project, items can be grouped together. For example, a project can include books, multimedia files, and web links into one collection. The projects will automatically show in the OPAC under the projects tab. Patrons can then search for the project and find the relevant information in one screen, rather than searching for the items individually.

1. Click **Catalog > Cataloging > Find/Add Projects**.
2. Click New.
3. Give the new project an appropriate title and a relevant description.
4. To add an item from the library catalog to the project, click Find Item.
5. Search for items in results.
6. Click Detail.
7. Repeat above until all items are added.
8. To add a URL/multimedia object to the project, click Attach.
9. Click New.
10. Select the attachment type from the dropdown menu (URL, Video or Audio, or Picture).
11. Enter a title for the attachment.
12. To attach a web site, enter the URL into the Location field.
13. To attach a multimedia file, browse for the file by clicking ...
14. Click Save to save the attachment.
15. Repeat above steps for all attachments.
16. Click Save to save the project.



Find/Add Publishers

Staff can maintain profiles of publishers in the library system.

Tip: Publishers can be merged in the system. This is useful when the same publisher has been added multiple times.

1. Click **Catalog > Cataloging > Find/Add Publisher**.
2. Click New.
3. Fill out the associated contact information.
4. Click Save.

Merge Publishers

This will merge multiple publishers into one publisher.

1. Click **Catalog > Cataloging > Find/Add Publisher**.
2. Click the Merge tab.

3. Find the first publisher for the merge.
4. From the search results on the left, select the publisher(s) for merge by checking the box to the left.
5. Click Add located in the center of the screen.
6. Once there are at least two publishers in the Selected (at least two) box the new name to be merged under can be selected.
7. Search for and select the new publisher, click Add located near the bottom of the screen.
8. The new publisher should appear in the New box.
9. Click Merge.
10. The publishers in the Selected box are now merged under the publisher name listed in the New box.

Find/Add Authority

Create authority files that become linked to bibliographic records as an authorized heading. They can include alternative names for the same topic and they will have “see” and “see also” labels that will appear in the catalog.

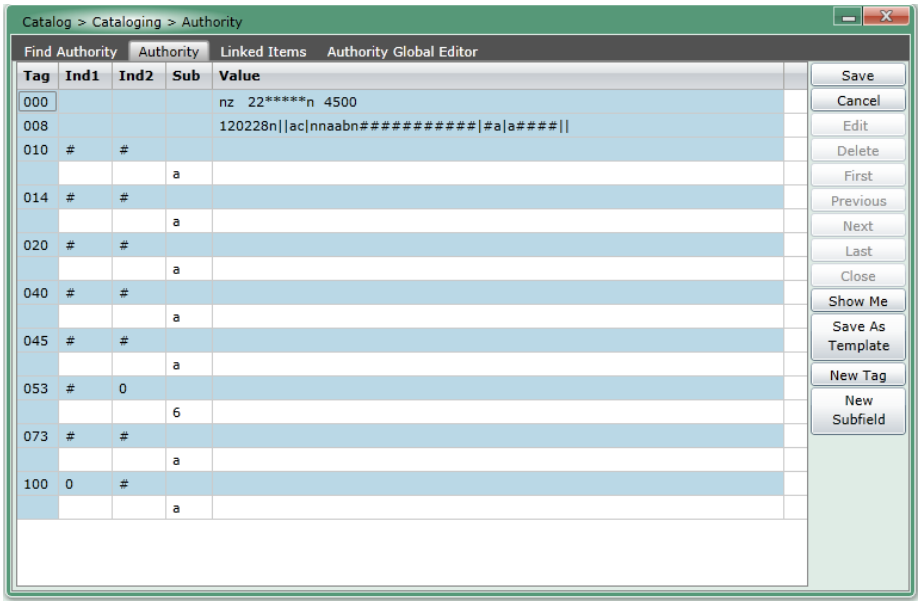
Find Authority

Search for authority records in your system and create new authority records.

1. Click **Catalog > Cataloging > Find/Add Authority.**
2. Use the search by criteria to find the title.
3. Click Detail to move to the next tab, Authority.

Authority

View this tab to customize tags, indicators, and subfields in your authority file. Maintain links to bibliographic records.



New

1. Click **Catalog > Cataloging > Find/Add Authority.**
2. Select the Authority tab.
3. Click New.
4. Select the desired tag, and click OK.
5. To add additional tags, click New Tag.

6. To save the record as a template, click Save As Template.
7. Enter a name for the template, or select a template from the dropdown list.
8. Click OK.
9. Enter the required information to create the record
10. Click Save.
11. Specify the index type for this authority record (i.e. author or subject or both). Click OK.

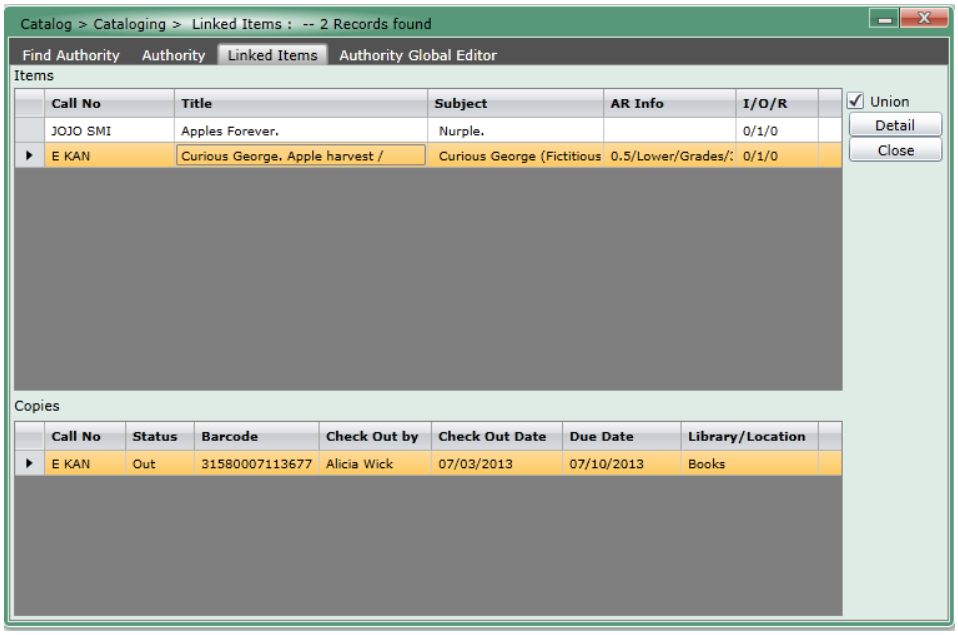
Edit

4. Click Edit. Click New Tag. to add tags.
5. Click New Subfield to add subfields to a tag highlighted in the left-hand grid
6. The appropriate subfields for that tag will appear on the pop-up with explanations. Click the appropriate subfield and click OK.
7. Click Save.
8. Confirm the index type for this authority record (i.e. author or subject or both).
9. Update linked bibliographic items associated with the authority file by selecting or deselecting the left-hand checkbox Bibliographic items will become linked when the authorized heading is typed in the appropriate cataloging fields. A dropdown will appear with the authorized label.
10. Click OK.

Linked Items

View changes to linked items in any given authority record, click Linked Items:.

1. Click Detail to find out more information on records and specify whether or not you want to view records from the union.
2. When an item is highlighted, the copy information becomes viewable in the bottom grid.

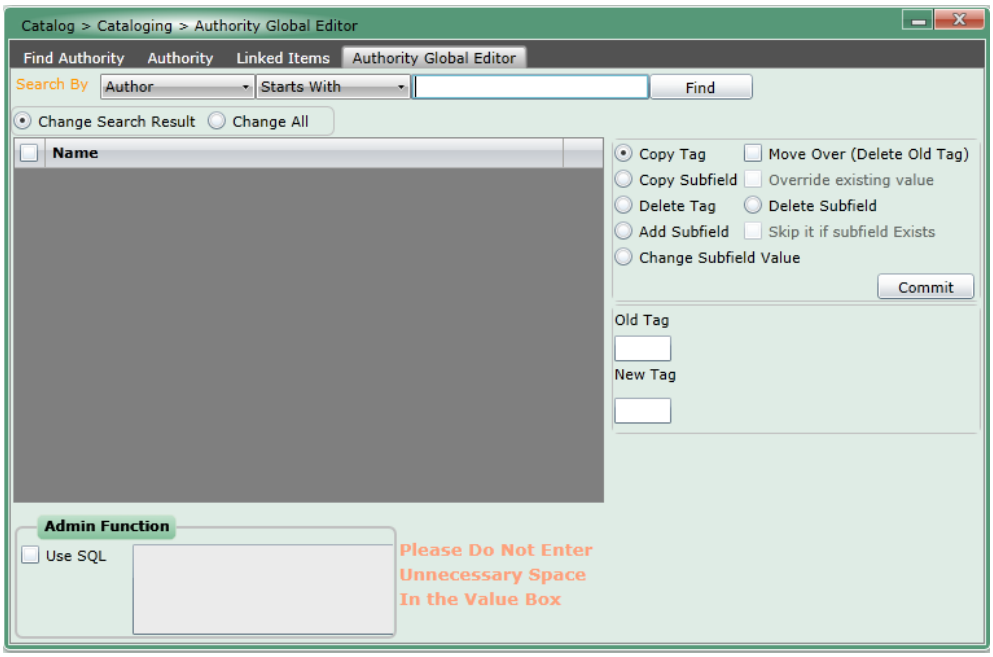


Authority Global Editor

This feature is for making a variety of global changes to authority records.

1. Click **Catalog > Global Change > Authority Global Editor**.
2. Select Change Search Result or Change All. Change All will all records in the system and change them.

3. Select all the records for applied changes.
4. Specify the criteria:
   4.1. Copy Tag:
      4.1.1. Copy data from Old Tag to New Tag or Move data from Old Tag to New Tag when Move Over check box is selected.
   4.2. Copy Subfield:
      4.2.1. Copy only a subfield of Old Tag to New Tag subfield, if Override Existing value is selected then it will override rather than adding it.
      4.2.2. To base the change only where old value matches a given string then specify the string and how it should be matched, Exact Match, Start With or End With.
      4.2.3. Specify the new value for change.
      4.2.4. To keep the old value, select Keep Old Value.
      4.2.5. To change the old value, specify the values to change from and to and how it should be changed: Change Left, Change Right, Append At The End, or Insert In The Beginning.



   4.3. Delete Tag:
      4.3.1. To Delete a tag select Delete Tag and also specify if needed what value should be matched when the Tag is deleted.
      4.3.2. If there are multiple tags, to keep only one, select the checkbox Keep One.
   4.4. Delete Subfield:
      4.4.1. To Delete a subfield select Delete subfield and also specify if needed the value match when deleting the subfield.
      4.4.2. To keep only one, select the checkbox Keep One.
   4.5. Add Subfield:
      4.5.1. To add a subfield to a Tag, specify the tag and subfield and the value. To skip subfields select checkbox for Skip.
   4.6. Change Subfield Value:
      4.6.1. Change the value for a subfield for a given tag.
      4.6.2. For this change to be based on only where old value matches a given string, and then specify the string and how it should be matched, Exact Match, Start With or End With.
      4.6.3. Specify the new value to be changed to.
      4.6.4. To keep the old value as well, then select Keep Old Value.

4.6.5. To change the old value, specify what it should change from, and to what value and how it should be changed: Change Left, Change Right, Append A The End, or Insert In The Beginning.

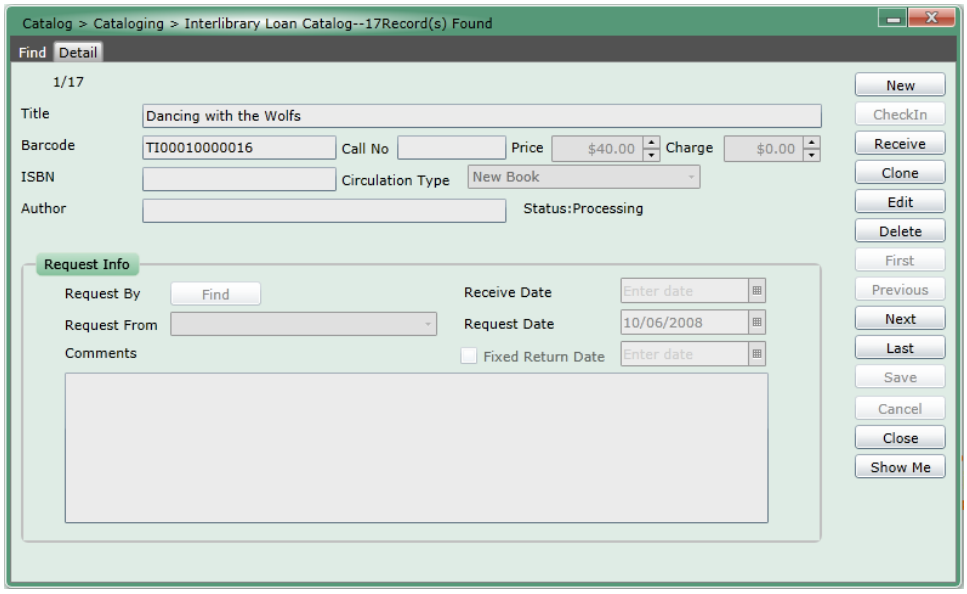
4.6.6. Click Commit.

5. A dialog box will prompt the number of records to be changed and require confirmation of the changes.

ILL Cataloging

This feature enables an item that has been requested from another library outside of the library union to be cataloged in the borrowing library's system.

16. Click **Catalog > Cataloging > ILL Cataloging**.
17. Click New.
18. Enter the information available.
19. In the Request Info find the requesting the Interlibrary Loan.
20. In the Request From dropdown, select which library to pick up the item from.
21. Add the Request Date if different from the date indicated on screen and the Return Date.
22. Add any Comments for this request.
23. Save the request.
24. A Temporary barcode will appear.
25. Contact the library regarding the ILL request.
26. The ILL saved can be seen on the patron's check out window under the ILL tab.
27. When the item is received, go to Find/Add Interlibrary.
28. Search and select the item.
29. Click Receive.
30. Scan a local barcode that user wish to affix to the item and click OK.

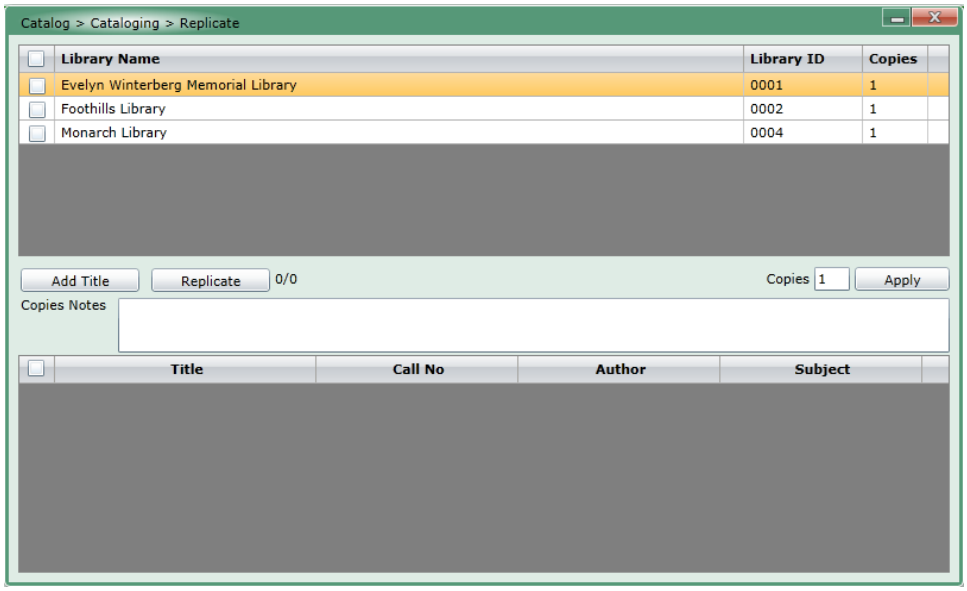


Replicate

This creates copies of both the item record and copy record from one library to other library sites selected on the checklist.

1. Click **Catalog > Cataloging > Replicate.**
2. Select the checkboxes beside the library sites receiving copies of title and copy records.
3. Add notes in the "Copies Notes" textbox.
4. Click Add Title.
5. Search for titles in the prompt and click OK.

6. Select the number of copies to be added to the selected library sites.
7. Click Replicate.



Recommended List

This allows staff to maintain the recommended list and the items that appear on it. This list appears in the OPAC.

1. Click **Catalog > Cataloging > Recommended List**.
2. Click Edit.
3. Select an item.
4. Click Remove.
5. Click Save.
6. Click Refresh if more entries are being populated into the recommended list.

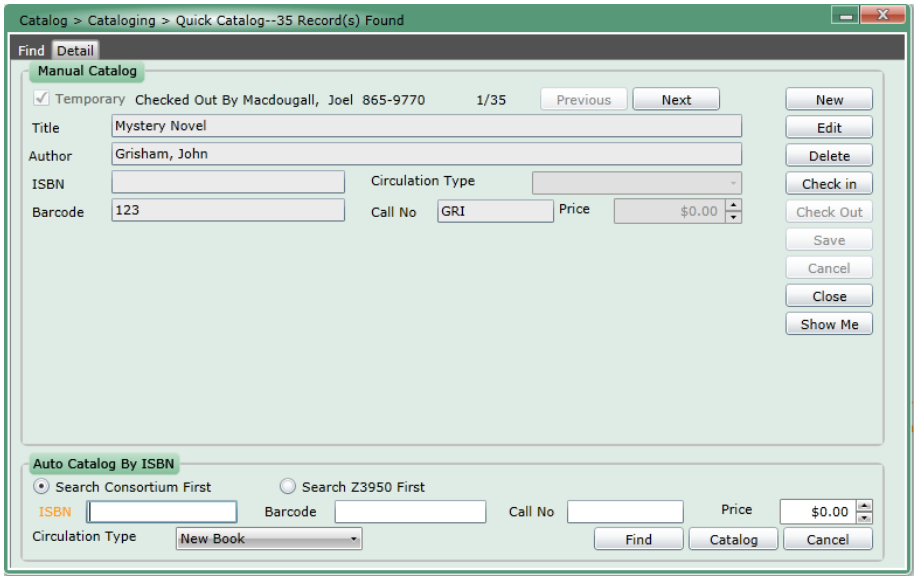
Tip: The Recommended window only removes titles form the list. In order to add Recommended items go to **Catalog > Cataloging > Find/Add Item** and click Recommend.

Quick Cataloging

The Quick Catalog feature allows items to be cataloged into the system with little information. This is useful if the item is immediately entering circulation prior to creating a complete record. This window can also be used to create Temporary items within the system.

1. Click **Catalog > Cataloging > Quick Cataloging.**
2. Click New.
3. Uncheck the Temporary check box.
4. Enter the information available.
5. Click Save.

Tip: Items cataloged from quick catalog can become transferred into the regular Cataloging interface through ISBN Cataloging, by providing an ISBN number and clicking Find to search for more information or by going straight into cataloging by clicking Catalog.

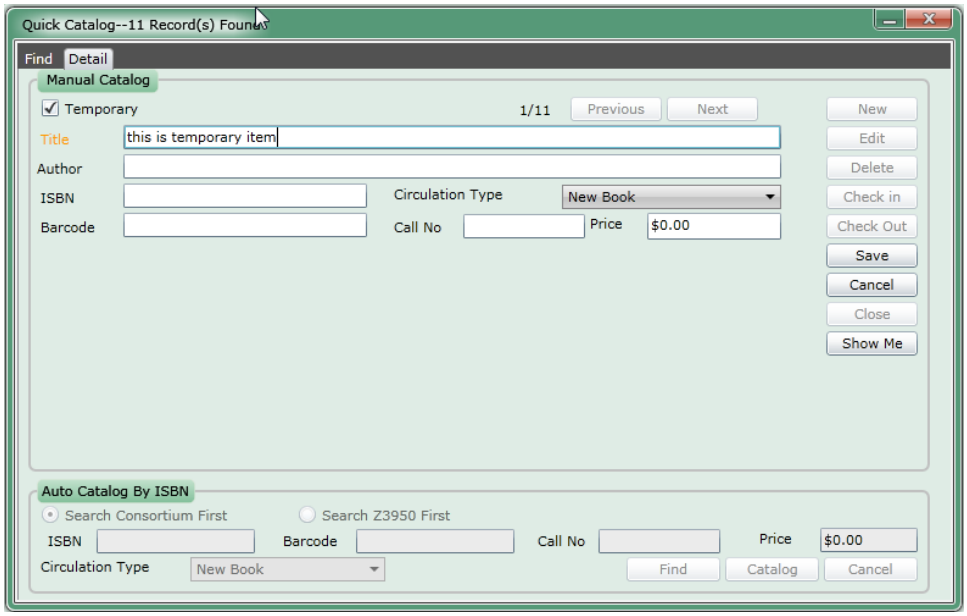


Quick Cataloging: Temporary Cataloging

User can catalog items as temporary because needs to be cataloged for one time checkout and then needs to be deleted once checked in.

1. Click **Catalog > Cataloging > Quick Cataloging.**
2. Click New.
3. Check the Temporary checkbox.
4. Enter the information available.
5. Click Save.

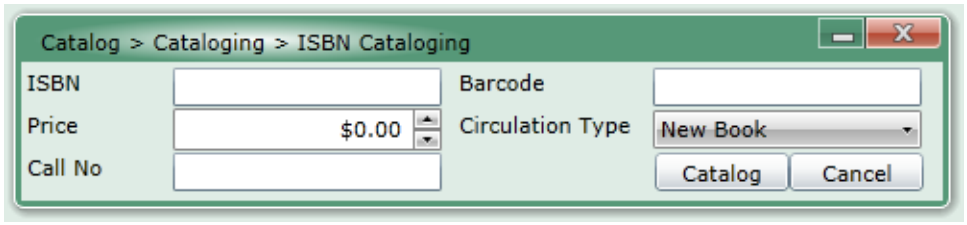
Tip: Once a temporary item is checked in it is deleted from the catalog.



ISBN Cataloging

The ISBN Cataloging window is used to quickly catalog and add items by ISBN number. This feature utilizes the Z39.50 hosts to collect the MARC record and adds a copy.

1. Click **Catalog > Cataloging > ISBN Cataloging.**
2. Input the ISBN.
3. Set available parameters.
4. Click Catalog.
5. Complete cataloging all ISBNs.

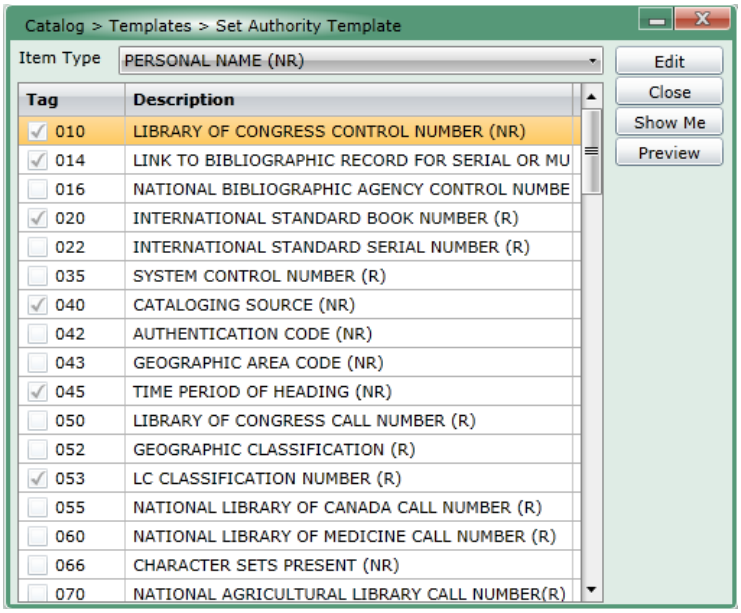


New From Template

An unlimited number of MARC templates can be created for items. These can be used to eliminate redundant manual entries while cataloging using MARC interface.

1. Click **Catalog > Cataloging > Find/Add Item.**
2. Click New.
3. Select the appropriate Bibliographic Item Type.
4. Specify the information.
5. Click Save As Template.
6. An Item Templates box will appear.
7. Select Create New.
8. Enter a name for the template and click OK.

Authority MARC Template

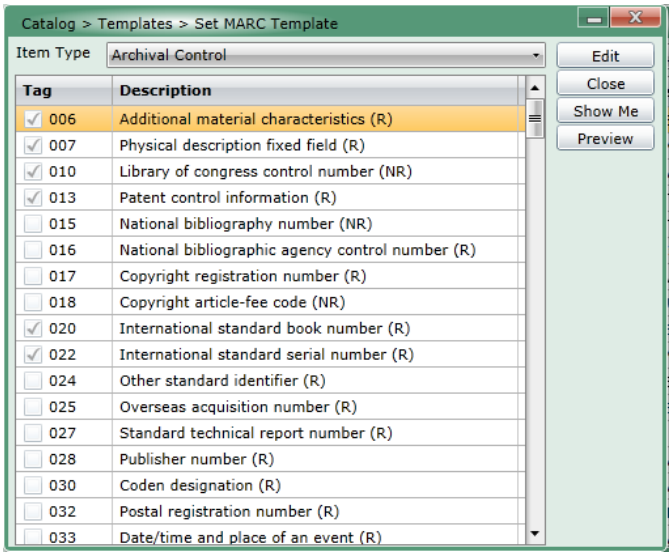

Catalog > Templates > Set Authority Template
Item Type
PERSONAL NAME (NR)
Edit
Close
Show Me
Preview
Tag
Description
010 LIBRARY OF CONGRESS CONTROL NUMBER (NR)
014 LINK TO BIBLIOGRAPHIC RECORD FOR SERIAL OR MU
016 NATIONAL BIBLIOGRAPHIC AGENCY CONTROL NUMBE
020 INTERNATIONAL STANDARD BOOK NUMBER (R)
022 INTERNATIONAL STANDARD SERIAL NUMBER (R)
035 SYSTEM CONTROL NUMBER (R)
040 CATALOGING SOURCE (NR)
042 AUTHENTICATION CODE (NR)
043 GEOGRAPHIC AREA CODE (NR)
045 TIME PERIOD OF HEADING (NR)
050 LIBRARY OF CONGRESS CALL NUMBER (R)
052 GEOGRAPHIC CLASSIFICATION (R)
053 LC CLASSIFICATION NUMBER (R)
055 NATIONAL LIBRARY OF CANADA CALL NUMBER (R)
060 NATIONAL LIBRARY OF MEDICINE CALL NUMBER (R)
066 CHARACTER SETS PRESENT (NR)
070 NATIONAL AGRICULTURAL LIBRARY CALL NUMBER(R)

New

Select the fields showing in the MARC Authority template for each item type.

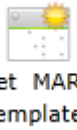
1. Click .
2. Select the appropriate authority type to edit.
3. Click Edit.
4. Select the appropriate tags by clicking the checkbox.
5. Click Save.

Set MARC Template


Catalog > Templates > Set MARC Template
Item Type
Archival Control
Edit
Close
Show Me
Preview
Tag
Description
006 Additional material characteristics (R)
007 Physical description fixed field (R)
010 Library of congress control number (NR)
013 Patent control information (R)
015 National bibliography number (NR)
016 National bibliographic agency control number (R)
017 Copyright registration number (R)
018 Copyright article-fee code (NR)
020 International standard book number (R)
022 International standard serial number (R)
024 Other standard identifier (R)
025 Overseas acquisition number (R)
027 Standard technical report number (R)
028 Publisher number (R)
030 Coden designation (R)
032 Postal registration number (R)
033 Date/time and place of an event (R)

New

Select the fields showing in the MARC Bibliographic template for each item type.



1. Click .
2. Select the appropriate authority type to edit.
3. Click Edit.
4. Select the appropriate tags by clicking the checkbox.
5. Click Save.

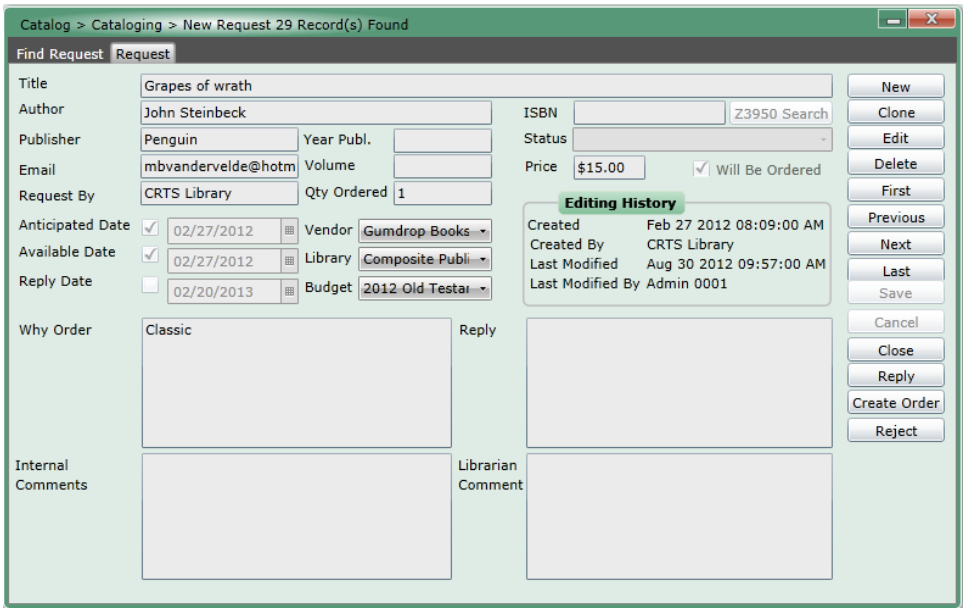
Find/Add New Request

Insignia Library System tracks requests for purchase materials. Patrons can make purchase requests using the Web OPAC. (For more information, see Requests in the Administration chapter of this manual). Library staff can review and reply to purchase requests.

New Request

Create requests for book orders in the Acquisitions module.

1. Click **Catalog > Cataloging > Find/Add New Request.**
2. Click New.
3. Enter the title of the item being requested as well as the author, ISBN, publisher, and email address of publisher if available.
4. In the Why Order field, enter the reason given for requesting the book.
5. Click Save.



Find Request

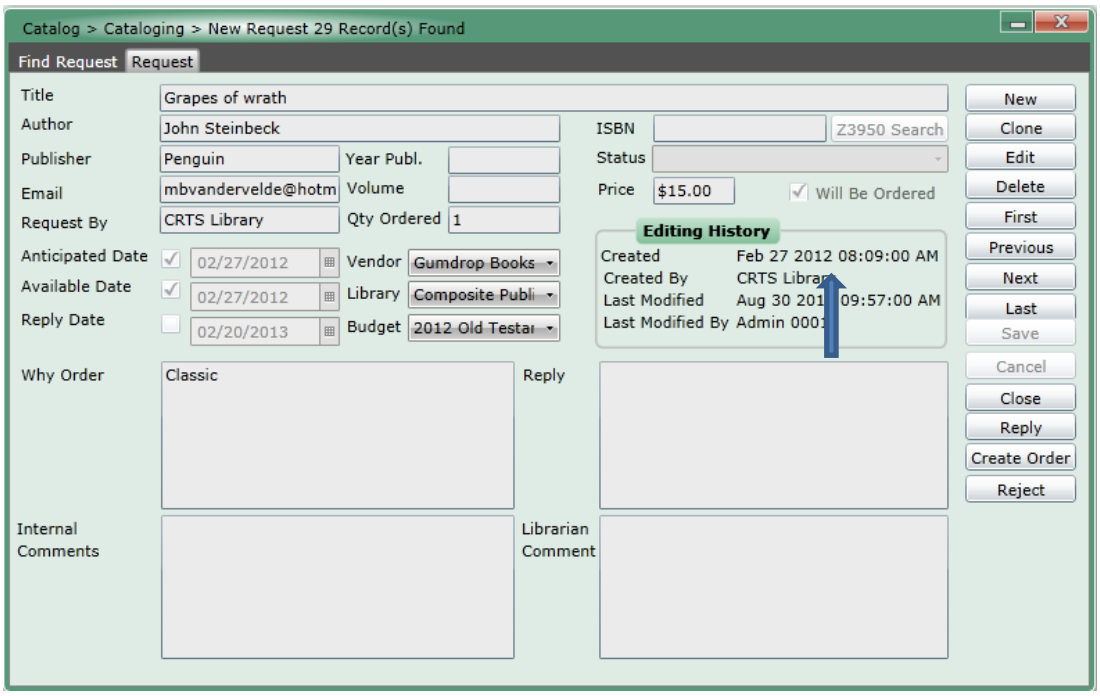
Search for requests from the patrons using the OPAC.

1. Click **Catalog > Cataloging > Find/Add New Request.**
2. Search for the request by title or select <All > to view all requests.
3. Select the request to review and click Detail.
4. The request can be marked as Will Be Ordered and the status may be changed to New, To Be Processed, or In Process as displayed in the following image.
5. An anticipated arrival date for the item, as well as an item availability date, may be entered.
6. Internal comments may also be added to a request.
7. To delete a request, click Delete.

Reply

Respond to requests from the patrons using the OPAC.

1. Click **Catalog > Cataloging > Find/Add New Request.**
2. Search for the request by title or select <All> to view all requests.
3. Select the request and click Detail.
4. Enter the response into the reply box and click Reply. The reply is sent to the email provided in the request to purchase.
5. Select Create Order in order to generate order from request screen.

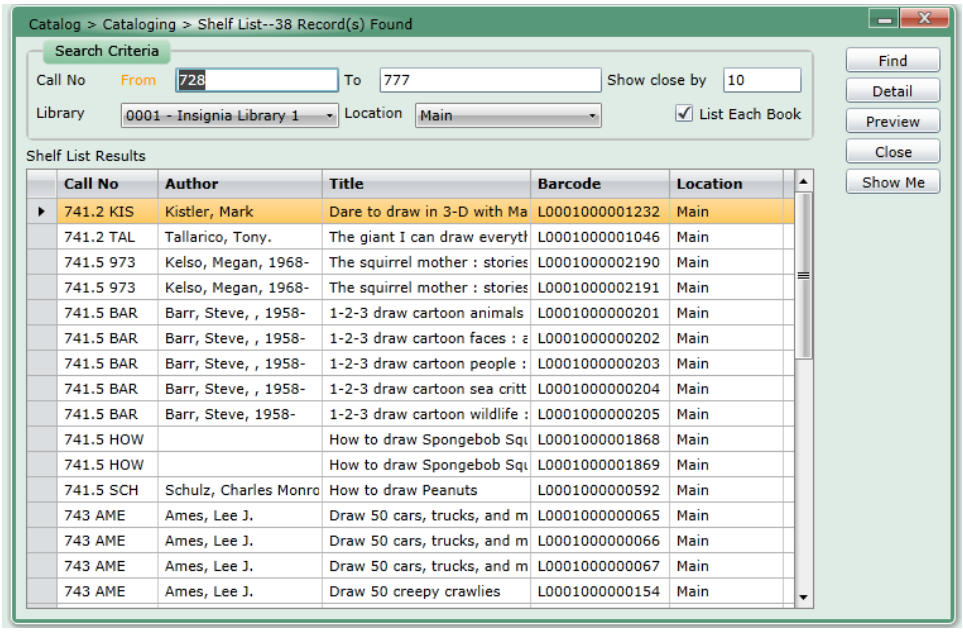


Shelf List

The Shelf List feature allows staff to create shelf lists according to a library within a district and have the option to limit by call number and location.

Search Criteria

1. Click **Catalog > Cataloging > Shelf List.**
2. Enter call number in From and To fields.
3. The value in Show close by determines how many records will be returned.
4. A call number range can also be entered without a Show close by value.
5. Choose the library and the location from the dropdown menus.
6. Click Find to display the shelf list.
7. To view a record, select it and click Detail.
8. Select the Preview button to display the list, print, export, and email the list.

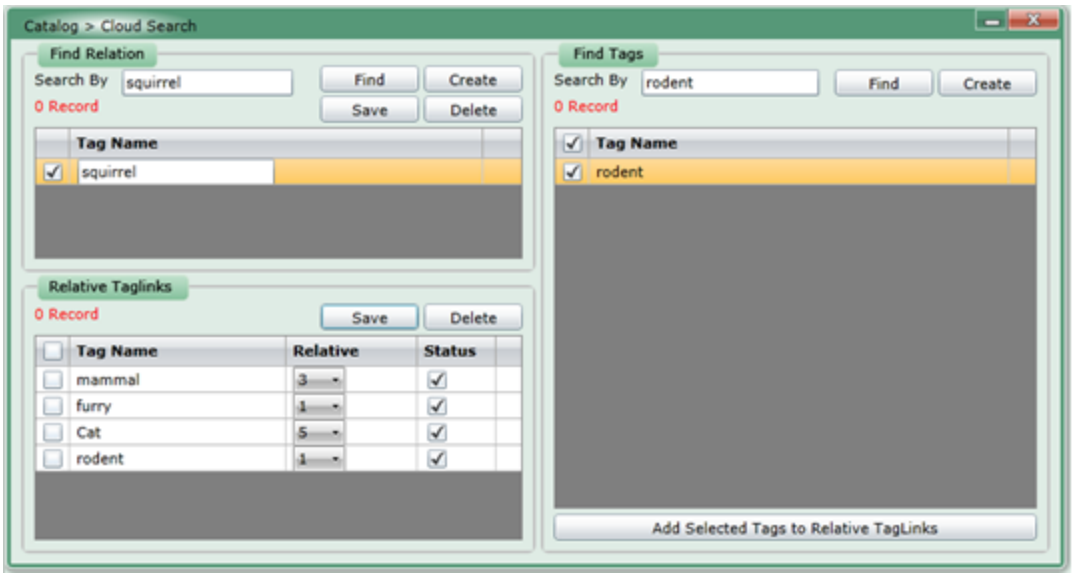

Catalog > Cataloging > Shelf List--38 Record(s) Found
Search Criteria
Call No From 728 To 777 Show close by 10
Library 0001 - Insignia Library 1 Location Main List Each Book
Find
Detail
Preview
Close
Show Me
Shelf List Results
Call No | Author | Title | Barcode | Location
741.2 KIS | Kistler, Mark | Dare to draw in 3-D with Ma | L0001000001232 | Main
741.2 TAL | Tallarico, Tony. | The giant I can draw everyth | L0001000001046 | Main
741.5 973 | Kelso, Megan, 1968- | The squirrel mother : stories | L0001000002190 | Main
741.5 973 | Kelso, Megan, 1968- | The squirrel mother : stories | L0001000002191 | Main
741.5 BAR | Barr, Steve, , 1958- | 1-2-3 draw cartoon animals | L0001000000201 | Main
741.5 BAR | Barr, Steve, , 1958- | 1-2-3 draw cartoon faces : a | L0001000000202 | Main
741.5 BAR | Barr, Steve, , 1958- | 1-2-3 draw cartoon people : | L0001000000203 | Main
741.5 BAR | Barr, Steve, , 1958- | 1-2-3 draw cartoon sea critt | L0001000000204 | Main
741.5 BAR | Barr, Steve, 1958- | 1-2-3 draw cartoon wildlife : | L0001000000205 | Main
741.5 HOW | | How to draw Spongebob Squ | L0001000001868 | Main
741.5 HOW | | How to draw Spongebob Squ | L0001000001869 | Main
741.5 SCH | Schulz, Charles Monro | How to draw Peanuts | L0001000000592 | Main
743 AME | Ames, Lee J. | Draw 50 cars, trucks, and m | L0001000000065 | Main
743 AME | Ames, Lee J. | Draw 50 cars, trucks, and m | L0001000000066 | Main
743 AME | Ames, Lee J. | Draw 50 cars, trucks, and m | L0001000000067 | Main
743 AME | Ames, Lee J. | Draw 50 creepy crawlies | L0001000000154 | Main

Cloud Search

Cloud Search is a feature that appears in the OPAC, in the Easy search tab. Searching items in the Easy search will create a cloud of related terms. The term in the center of the cloud will be the searched term. Terms surrounding the center are related to the search term. Terms that are closer in meaning to the search term will also be closer to the center of this cloud. This feature allows the patron to expand their search by providing related terms. Cloud search is fully customizable.

Find

1. Click **Catalog > Cloud Search.**
2. Enter the search term that creates the cloud in the Find Relation box.
3. Click Find.
4. A prompt will appear if the term needs to be created.
5. Enter the related term in the *Find Tags*.
6. Click Find.
7. A prompt will appear if the term needs to be created.
8. Click Add Selected Tags to Relative TagLinks.
9. Repeat steps 5-8 until all related tags appear in the Relative Taglinks box.
10. Select Relative numbers from the dropdown box to apply to each Tag Name. The closer the number is to 1 the closer in relation the tag is to the above search term and the closer it will appear to the center of the cloud.
11. Click Save.



Collection Analysis

ILS provides a collection analysis tool for weeding and resource allocation purposes. This analysis can be restricted to section of the library or the entire collection.

Collection Analysis Objectives:

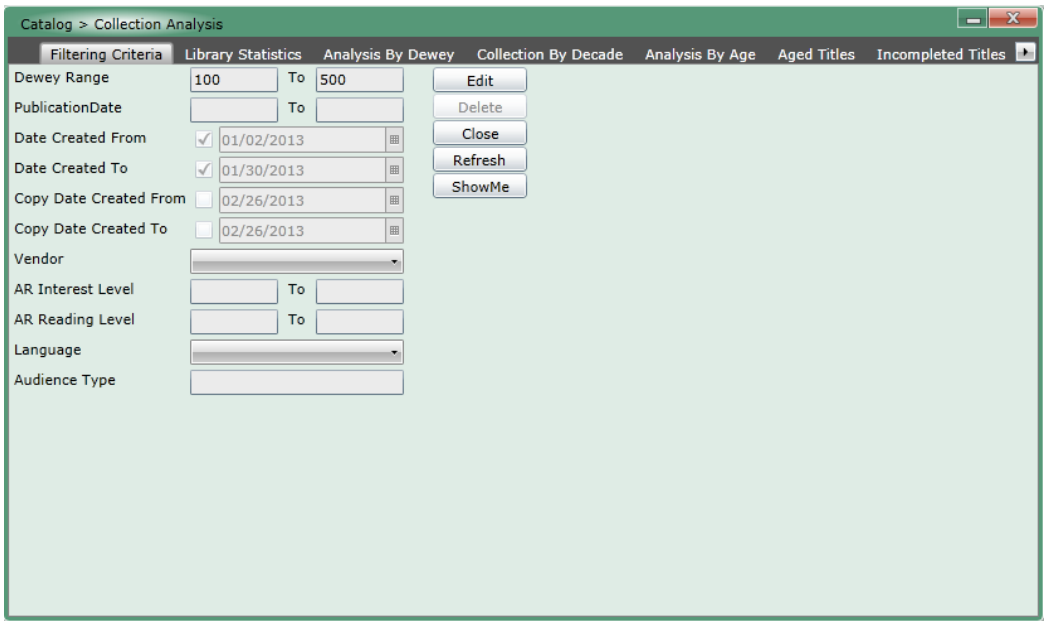
1. Snapshot of Collection Statistics
2. Collection by Age
3. Collection by Dewey
4. Collection by Decade
5. List of Aging Titles
6. List of incomplete Titles
7. Collection Comparison

Filtering Criteria

Filtering Criteria tab provides the opportunity to narrow down part of the collection to be analyzed. The collection can be filtered by primarily Dewey range.

Edit

1. Click **Catalog > Collection Analysis.**
2. Enter the following applicable search criteria:
   - 2.1 Dewey Range
   - 2.2 Publication Date
   - 2.3 Date Created From and Date Created To
   - 2.4 Copy Date Created From and Copy Date Created To
   - 2.5 Vendor
   - 2.6 AR Interest Level From and To
   - 2.7 AR Reading Level From and To
   - 2.8 Language
   - 2.9 Audience Type.
3. Click Save.



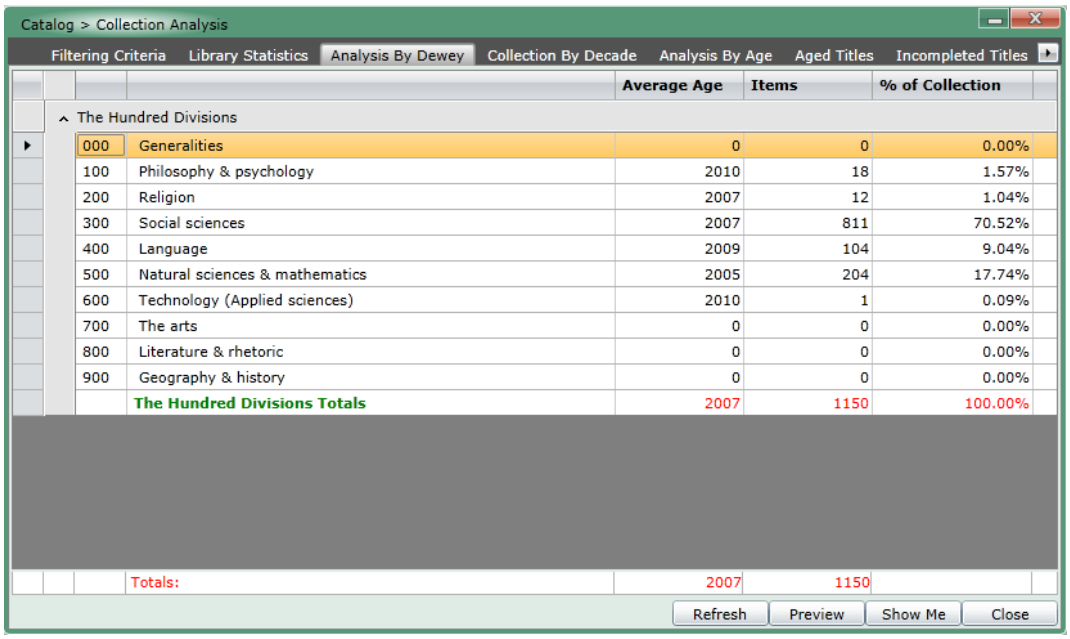
Library Statistics

Library Statistic tab displays a quick snapshot of what is in the library.

1. Click **Catalog > Collection Analysis.**
2. Click the Library Statistics Tab.
3. Analyze data under the following two categories: Collection Information and School Information.
4. View information such as the collection size, items per student, and average age of library materials in the Collection Information Category.
5. View address and contact information in the School Information category.

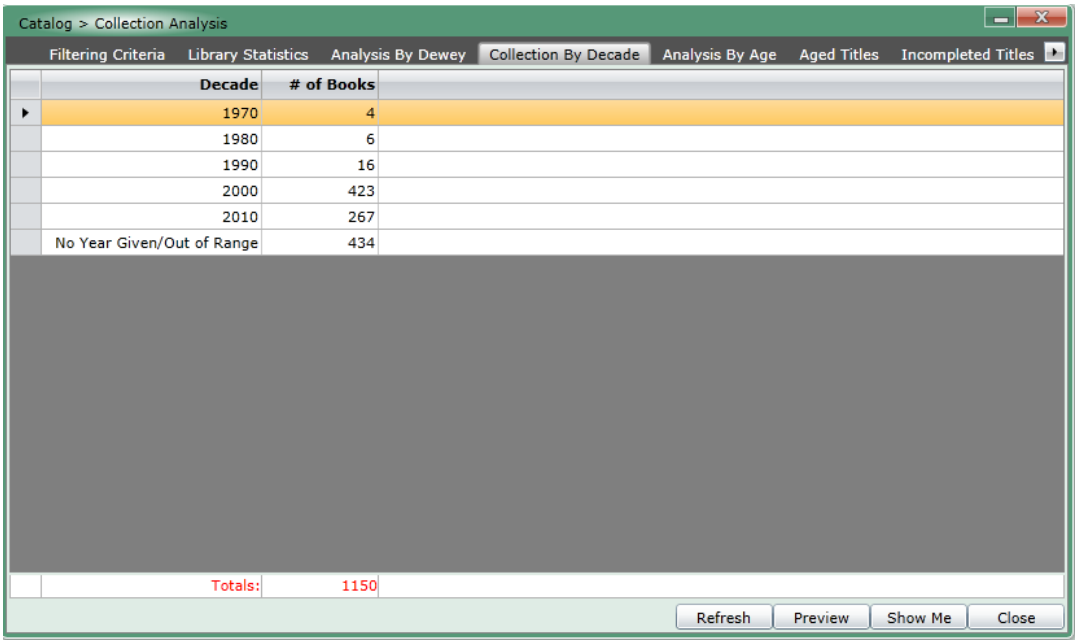
Analysis by Dewey Classification

Analysis by Dewey tab provides a collection count based on Dewey classification. It also provides Non-Dewey category listings from the MARC Information and provides totals on the bottom line.



Collection by Decade

This tab organizes the number of books by decade and sorts out books that do not belong in a particular decade or have no year given.

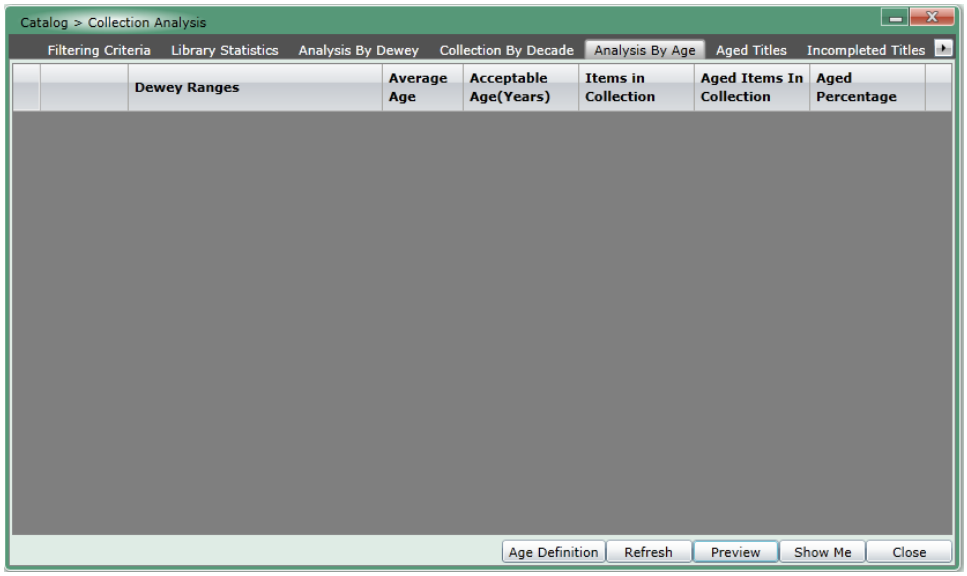


Analysis by Age

Analysis by Age tab provides an analysis of item age based on Dewey Range. It covers the following information:

1. Average Age
2. Acceptable Age
3. Items in Collection
4. Aged Items in Collection

5. Aged Percentage.

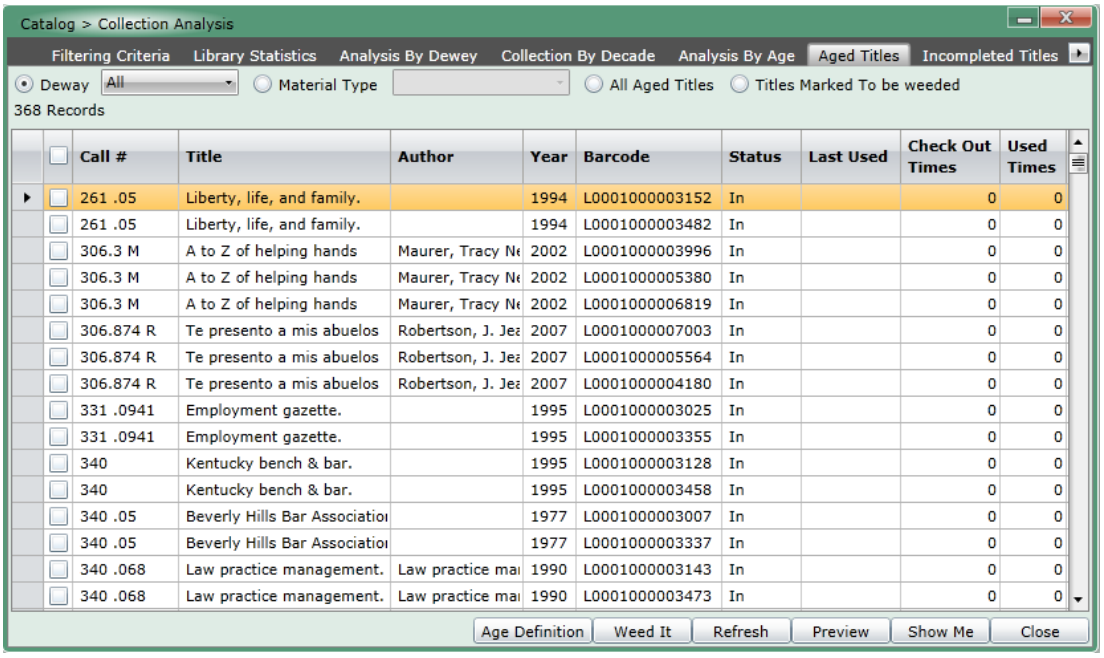


Aged Titles

Aged titles tab lists the titles with its respective title information with the following additional circulation information:

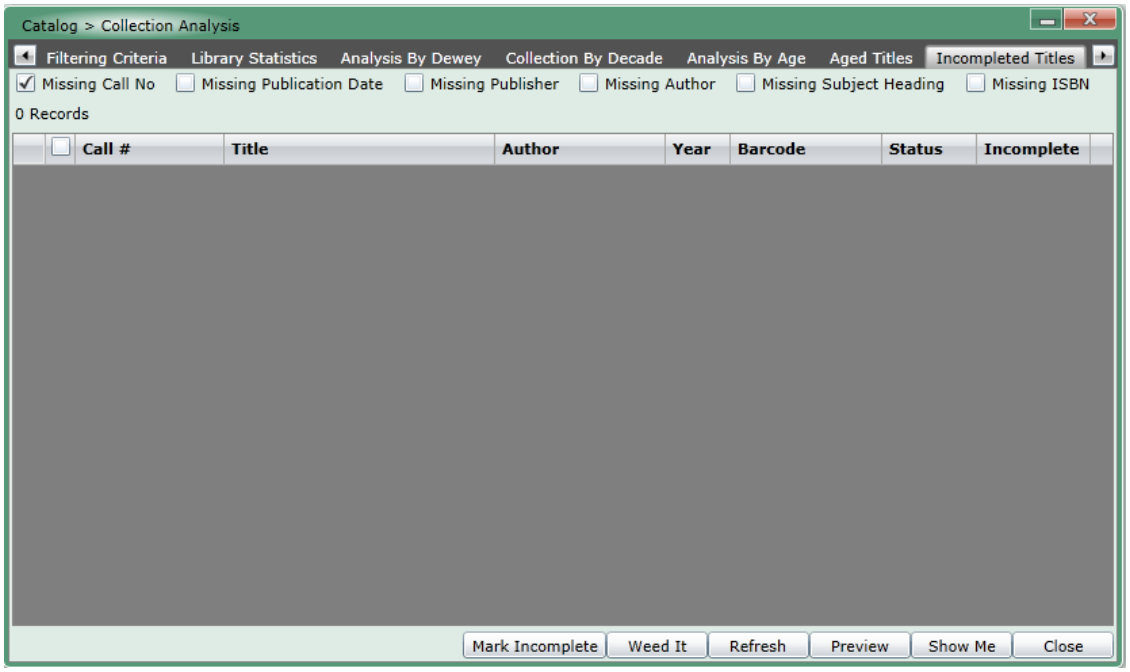
1. Status
2. Last Used Date
3. Check Out Times
4. Used Times

This interface enables the user to mark items by the checkbox to be weeded. The **Age Definition button** provides a reference to see the relative age of the copies in the shelf list by Dewey Category.


Catalog > Collection Analysis
Filtering Criteria
Library Statistics
Analysis By Dewey
Collection By Decade
Analysis By Age
Aged Titles
Incompleted Titles
Deway
All
Material Type
All Aged Titles
Titles Marked To be weeded
368 Records
Call #
Title
Author
Year
Barcode
Status
Last Used
Check Out Times
Used Times
261 .05 Liberty, life, and family. 1994 L0001000003152 In 0 0
261 .05 Liberty, life, and family. 1994 L0001000003482 In 0 0
306.3 M A to Z of helping hands Maurer, Tracy Ne 2002 L0001000003996 In 0 0
306.3 M A to Z of helping hands Maurer, Tracy Ne 2002 L0001000005380 In 0 0
306.3 M A to Z of helping hands Maurer, Tracy Ne 2002 L0001000006819 In 0 0
306.874 R Te presento a mis abuelos Robertson, J. Jea 2007 L0001000007003 In 0 0
306.874 R Te presento a mis abuelos Robertson, J. Jea 2007 L0001000005564 In 0 0
306.874 R Te presento a mis abuelos Robertson, J. Jea 2007 L0001000004180 In 0 0
331 .0941 Employment gazette. 1995 L0001000003025 In 0 0
331 .0941 Employment gazette. 1995 L0001000003355 In 0 0
340 Kentucky bench & bar. 1995 L0001000003128 In 0 0
340 Kentucky bench & bar. 1995 L0001000003458 In 0 0
340 .05 Beverly Hills Bar Associatio 1977 L0001000003007 In 0 0
340 .05 Beverly Hills Bar Associatio 1977 L0001000003337 In 0 0
340 .068 Law practice management. Law practice ma 1990 L0001000003143 In 0 0
340 .068 Law practice management. Law practice ma 1990 L0001000003473 In 0 0
Age Definition
Weed It
Refresh
Preview
Show Me
Close

Incomplete Titles

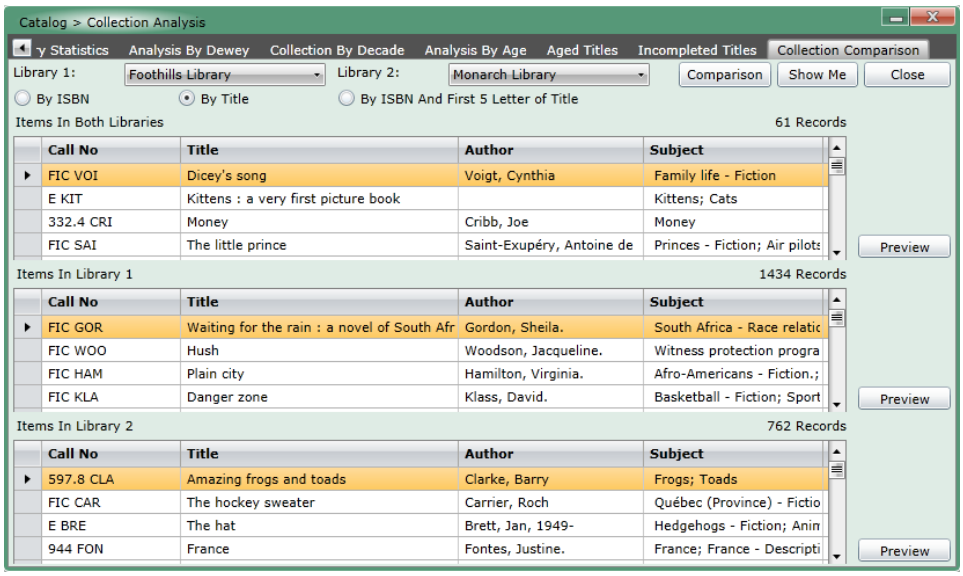
Incomplete Titles tab lists titles that do not have complete catalog information. This may be due to missing information such as the ISBN, Call No, Author, publication date, or subject headings. This interface enables the user to mark items by the checkbox to be weeded. The **Age Definition button** provides a reference to see the relative age of the copies in the shelf list by Dewey Category.



Collection Comparison

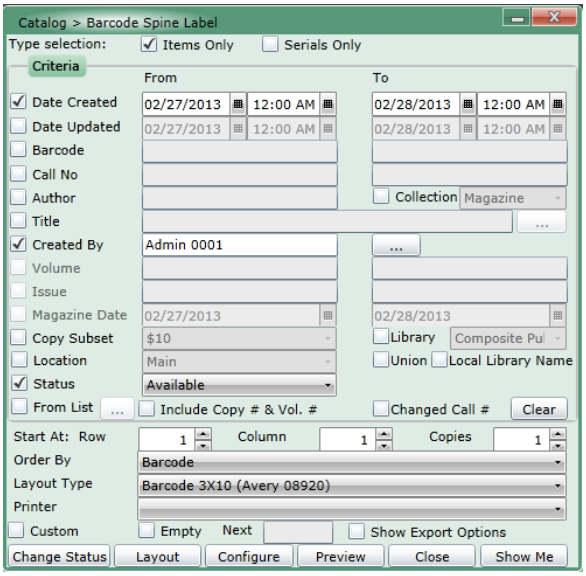
The Collection comparison will list all of the records in your collection analysis found at library one and library two. The list of records total will show on the right-hand side. The results can be sorted by the following categories:

1. by ISBN
2. By Title
3. By ISBN and first 5 letter of title.



Barcode Spine Labels

Barcodes and spine labels can be printed by clicking on Barcode/Spine Label in the Cataloging module. Barcode labels can also be printed directly from the Copy Information for the barcode.

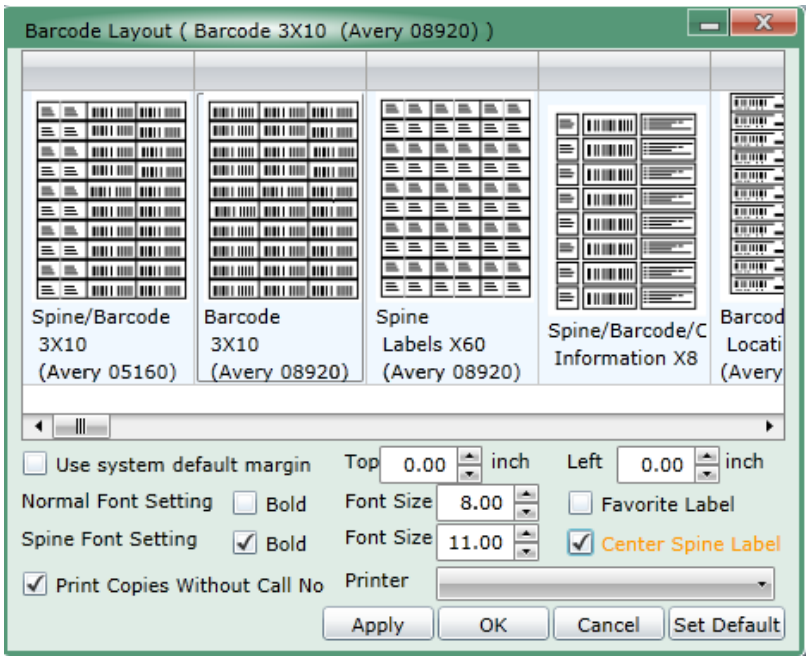


Preview

1. Click **Catalog > Barcode/Spine Label.**
2. Select the Items Only or Serials Only checkbox to print the appropriate label.
3. Specify the criteria for labels for printing:
   - 3.1. Date created (This is the most common criteria selected).
   - 3.2. Date updated
   - 3.3. Barcode
   - 3.4. Call number
   - 3.5. Author
   - 3.6. Title
   - 3.7. Created By (If the login name here is not the login of the user who created the records, deselect this criteria).
   - 3.8. Copy Subset
   - 3.9. Location
   - 3.10. Status
   - 3.11. From List: this criterion enables the scanning and typing of multiple barcodes to print).
   - 3.12. Include Copy # & Vol. #: this enables volume numbers to show from copy information with the following layout type: Spine/Barcode 3X10 (Avery 05160).
   - 3.13. Changed Call #: this allows changed call numbers to become part of the print list when selected. Clear will erase this data.
4. Select the row and column on the print sheet where printing is to begin. This feature is for a print sheet not fully used.
5. Select the number of copies to print
6. Click the Order by dropdown arrow to select the barcode print order.
7. Choose a label sheet layout, pick one from the dropdown list Or
8. Click the Layout button and scroll to find the desired layout.
   - 8.1. Click the desired layout (the selected layouts description will appear in green).
   - 8.2. Click Set Default to select the layout as default.

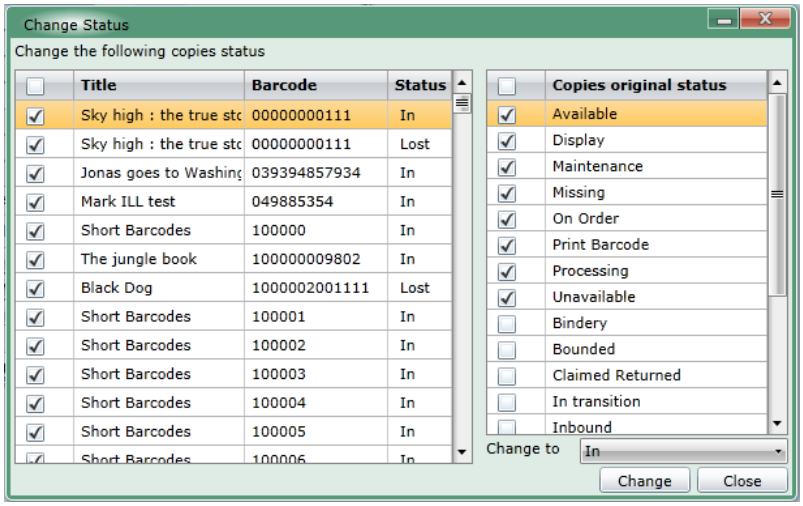
8.3. Check the box Use system default margin to print labels using the default margins or adjust the margins if needed.

9. Click Preview to view the labels.
10. If the Preview does not appear, hold down Ctrl. This may be due to popups being disallowed in the browser.
11. Click the print icon to print the labels.
12. If the Serials Only has been selected the option to have the Volume, Issue, and Magazine Date will be accessible.
13. To limit selections by library this can be done by checking the Library box and then selecting the library.



Change Status

1. Click **Catalog > Barcode/Spine Label.**
2. Click Change Status.
3. Select the copies that need a status change.
4. The original status of the copies will be selected in the right-hand menu.
5. Select the Change to dropdown to the appropriate status for the change.
6. Click Change.



Layout

1. Click **Catalog > Barcode/Spine Label.**
2. Click Layout.
3. Use system default margin will set the margin back to its default.
4. Modify the margin on the top and left hand side.
   4.1. Use negative values to move the margin down and closer to the left-hand page.
5. Specify the Normal and Spine Font Settings if they're bold or need a font size adjustment.
6. Check "Favorite Label" to specify the label to be on the layout type list.
   6.1. After clicking one of these labels as a favorite, the full list of labels will disappear from the barcode menu and will only show labels with "Favorite Label" checked.
7. Center Spine Label will put adjust the label into the center of the label sticker.
8. Print copies without call number will include barcodes and spine labels in queue with no Spine Label filled out.
9. Select the default printer from the dropdown.
10. Click Apply and click OK.

Configure

1. Click **Catalog > Barcode/Spine Label.**
2. Click Configure.
3. Select the appropriate barcode configuration from the menu.
   3.1. Insignia recommends Code 128A and Code 39 for your barcode configuration.
   3.2. If you need a new barcode scanner, Insignia recommends buying one through our company for optimal support. Please contact Insignia Technical Support for more details.

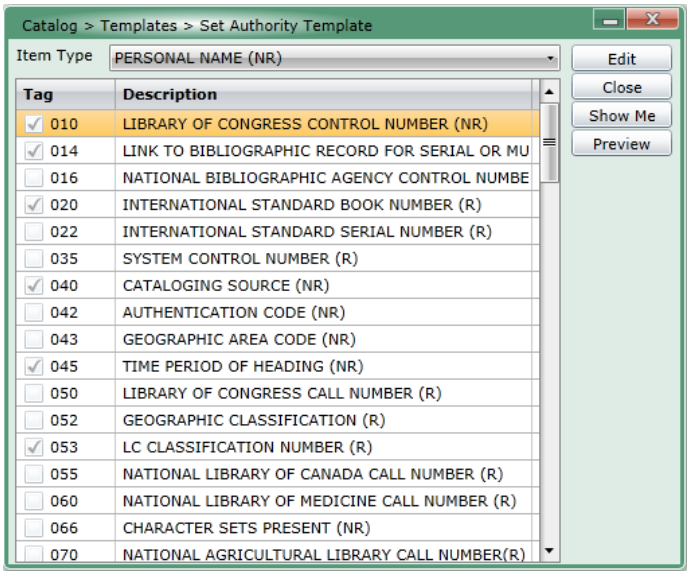
Templates

There are two templates that can be edited in the Catalog Module. These templates are the authority template and the bibliographic template. These editing features allow the user to select the tags displayed when creating an Authority or Bibliographic record.

New From Template

1. **Click Catalog > Cataloging > Find/Add Authority**.
2. Click the Authority tab.

3. Click New From Template.
4. Select desired template.
5. Click OK.
6. Update the record as required.
7. Click Save.
8. Specify the type of index desired for this authority record (author subject or both).
9. Click OK.

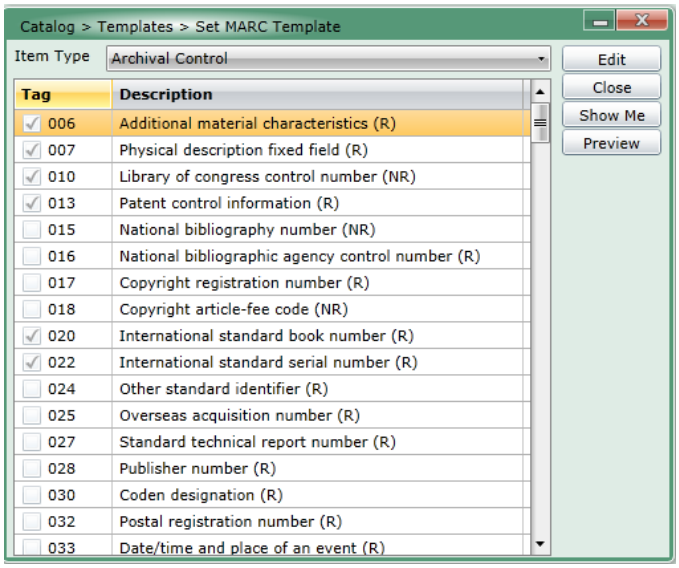

Catalog > Templates > Set Authority Template
Item Type
PERSONAL NAME (NR)
Edit
Close
Show Me
Preview
Tag
Description
010 LIBRARY OF CONGRESS CONTROL NUMBER (NR)
014 LINK TO BIBLIOGRAPHIC RECORD FOR SERIAL OR MU
016 NATIONAL BIBLIOGRAPHIC AGENCY CONTROL NUMBE
020 INTERNATIONAL STANDARD BOOK NUMBER (R)
022 INTERNATIONAL STANDARD SERIAL NUMBER (R)
035 SYSTEM CONTROL NUMBER (R)
040 CATALOGING SOURCE (NR)
042 AUTHENTICATION CODE (NR)
043 GEOGRAPHIC AREA CODE (NR)
045 TIME PERIOD OF HEADING (NR)
050 LIBRARY OF CONGRESS CALL NUMBER (R)
052 GEOGRAPHIC CLASSIFICATION (R)
053 LC CLASSIFICATION NUMBER (R)
055 NATIONAL LIBRARY OF CANADA CALL NUMBER (R)
060 NATIONAL LIBRARY OF MEDICINE CALL NUMBER (R)
066 CHARACTER SETS PRESENT (NR)
070 NATIONAL AGRICULTURAL LIBRARY CALL NUMBER(R)

Authority

1. Click **Catalog > Templates > Authority**.
2. Select an Item Type from the drop-down list.
3. Click Edit.
4. Check the tags that are to appear on the Authority Code tab for items of that type.
5. Click Save.

Bibliographic

1. Click **Catalog > Templates > Bibliographic**.
2. Select an Item Type from the drop-down and click Edit.
3. Select the tags to appear in the MARC Code tab for items of that type.
4. Click Save.

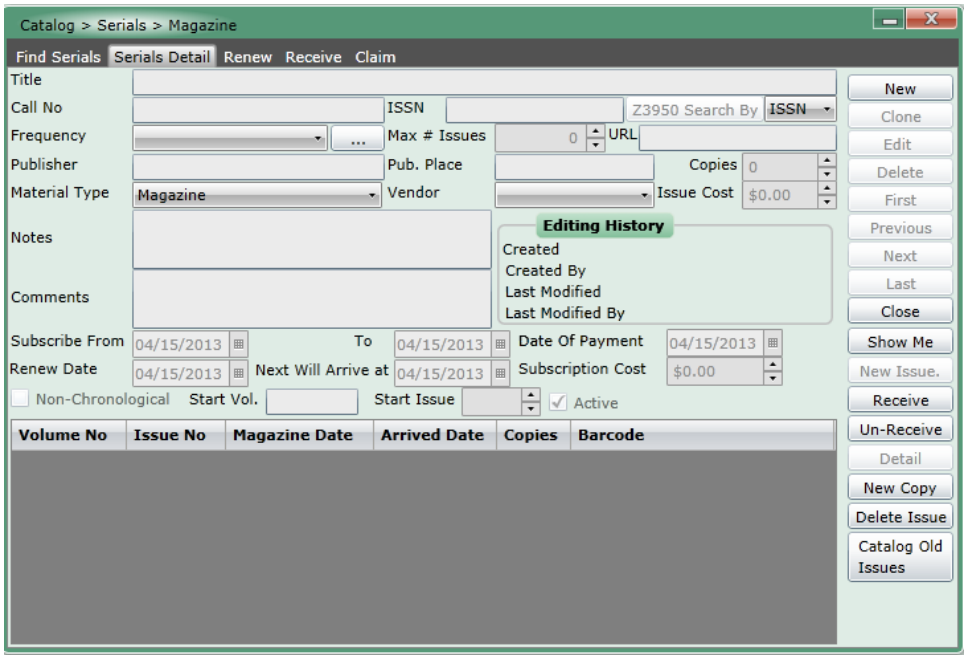

Catalog > Templates > Set MARC Template
Item Type
Archival Control
Edit
Close
Show Me
Preview
Tag
Description
006 Additional material characteristics (R)
007 Physical description fixed field (R)
010 Library of congress control number (NR)
013 Patent control information (R)
015 National bibliography number (NR)
016 National bibliographic agency control number (R)
017 Copyright registration number (R)
018 Copyright article-fee code (NR)
020 International standard book number (R)
022 International standard serial number (R)
024 Other standard identifier (R)
025 Overseas acquisition number (R)
027 Standard technical report number (R)
028 Publisher number (R)
030 Coden designation (R)
032 Postal registration number (R)
033 Date/time and place of an event (R)

Serials

Insignia Library System (ILS) has an integrated Serials feature. It keeps track of information for periodicals such as subscription costs, expiry date and anticipated arrival date of issues. It also allows for renewal of subscriptions, receiving issues globally and creating formal and informal routing lists.

New

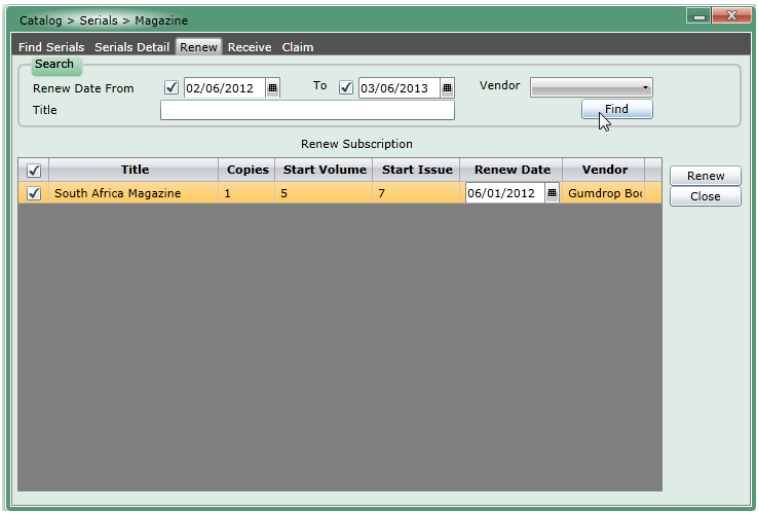
1. Click **Catalog > Serials > Find/Add Serials.**
2. Click New.
3. If applicable, select the checkbox non-chronological or continue as a chronological serial.
4. Enter the date the subscription starts.
5. Enter the date the subscription expires.
6. Enter when the next issue is expected to arrive.
7. Enter the date the subscription for renewal (should be the same as the expiry date).
8. Enter the first volume received.
9. Enter the first issue received.
10. Save the record.
11. Click Receive to receive the issue entered.
12. Click Un-Receive to mark the issue entered as not received.



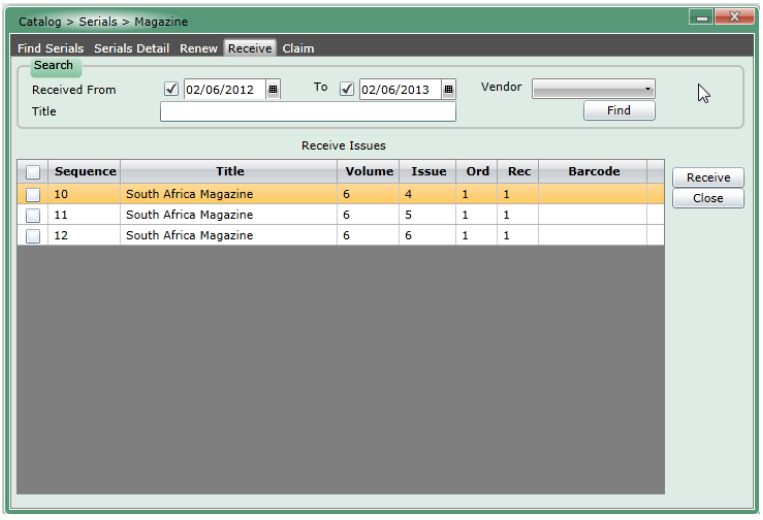
Renew

This feature generates a list of serial titles that the library will receive. This should be used after a new serial subscription is entered into the system. The *Renew Date* in Catalog > Serials, Renew tab should be *in between* the *Subscribe From* and *Subscribe To* dates.

1. Click **Catalog > Serials.**
2. Click the Renew tab.
3. Enter a date range for serials.
4. Click Find.
5. The magazines that fall within that date range will now appear.
6. Select the magazine titles to renew.
7. Check the issue(s) and click Renew.



Receive



1. Click Catalog > Serials > Receive tab.
2. Enter a date range for serials.
3. Click Find.
4. The magazines that fall within that date range will now appear.
5. Make sure the title is checked and then click the Receive button.
6. If more than one copy per issue is being received and only part of the order is received, indicate the number of copies received.
7. This will now create entry for the issue and give it a barcode number.
8. For additional copies received at a later date, go back into the same screen and update the received column. The additional copy will require a barcode number.

Claim

Claiming subscription issues not sent by vendor:

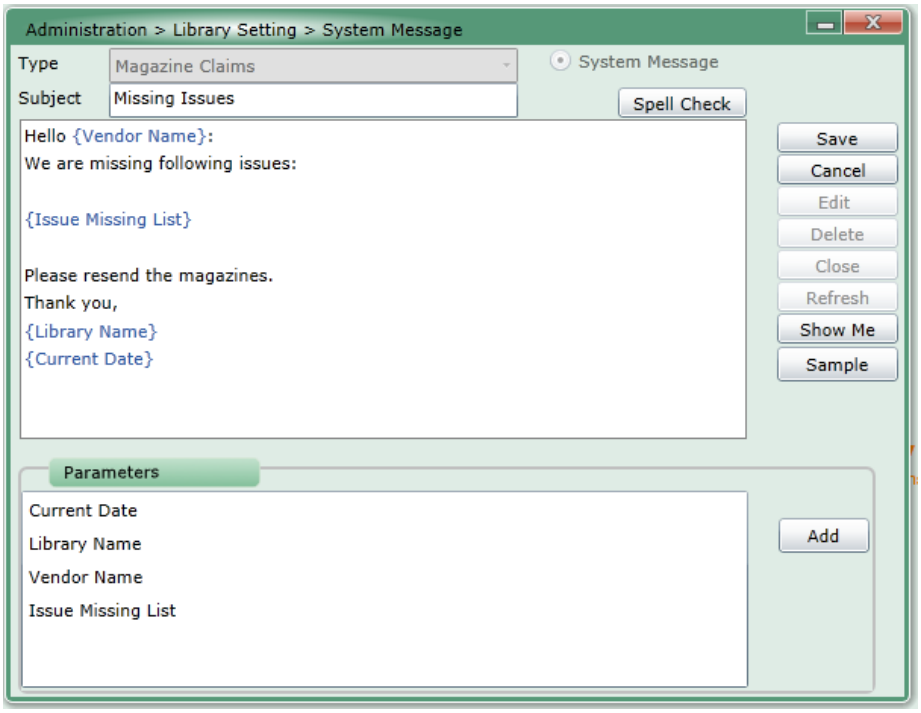
1. Click **Catalog > Serials > Find/Add Serials.**
2. Select the **Claim** tab.
3. Search by the Received From and To date.
4. To view all serials deselect the From and To checkboxes.
5. The title and vendor is not necessary if checking all subscriptions not received within the time frame.
6. Click Find.
7. The issues that have not been received will appear in the window.
8. Select the issue to receive and click the Claim button at the base of the screen.
9. The claimed issues will now appear in the claim report.

Administration > System Messages

Edit system messages including a magazine claim record in System Messages.

1. Before a claiming report can be generated, this must be created in **Administration > Library Setting > System Messages**.
2. Select the Type (i.e. Magazine Claims). There are three messages for each message type that can be used for printing messages.
3. Click Edit.
4. Add a Subject value (i.e. Magazine Claim Letter).

5. The parameters in the window are linked fields that will add the correct values to the reports from the ILS program. Select them when formatting the letter.
6. Save the formatted claim letter.



Reports > Miscellaneous

The magazine claim report can be customized and run in this module.

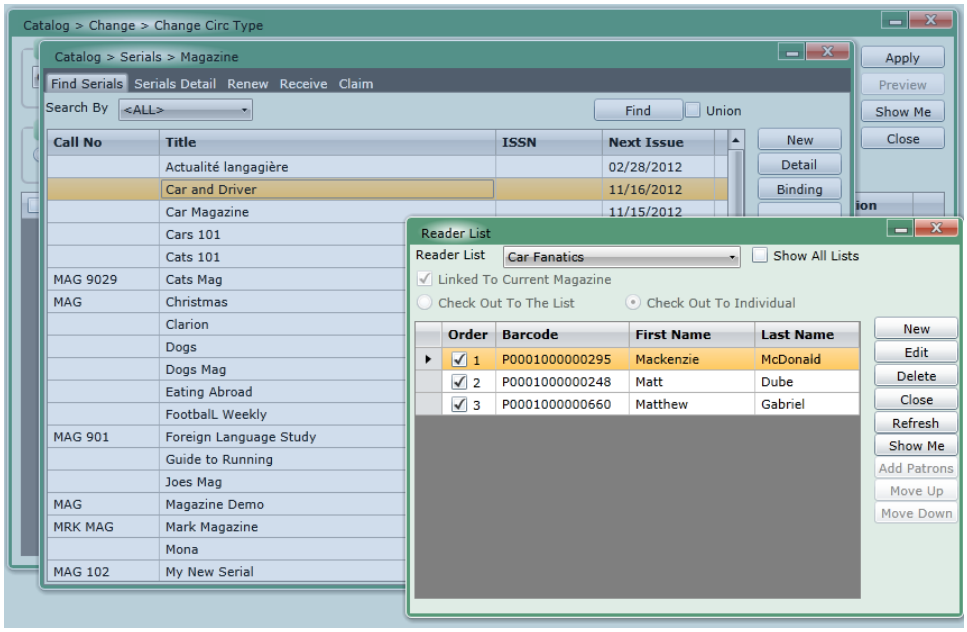
1. Click **Reports > Miscellaneous > Magazine Claims.**
2. Select Vendor Name, From and To Date, and the Customized message.
3. Ensure that Show Export Options checkbox is checked.
4. Click Preview.
5. A print and email icon will be available in the print preview screen. The email icon will attach the Magazine Claim letter to the email with the file name magazineclaim.rtf.
6. Add the contact email information and send to the vendor

Routing List

The ILS has a feature to route serials through a reader list. This allows for new issues of a magazine to check out to a list of readers as they are received.

1. Click **Catalog > Serials > Find/Add Serials.**
2. Search for the serial to create for the reader list and then select it.
3. Click Routing List.
4. Click New.
5. Enter a title for the list or select Show All Lists and select from the list.
6. Select the check box Linked to Current Magazine to link the routing list to the selected serial.
7. Add patrons to the list by clicking Add Patrons and then searching for the patrons.
8. Once patrons have been added to the list, click Save.
9. To change the Routing List and link it to another serial, select Edit, unlink the reader list and link the new serial to the routing list.

10. Once a Routing List for a serial is created, the system automatically reserves the new issue for the patrons in the order they are listed.



Tip: The serial can be checked out to the list. This is where each patron gives the serial to the next patron on the list without checking the serial checked back in after each patrons use. Additionally, the serial can be checked out to the first patron on the list then checked back in by the library, checked out to the second patron on the list and so on. These selections are made by selecting the radio buttons Check Out to the List or Check Out to the Individual.

Routing

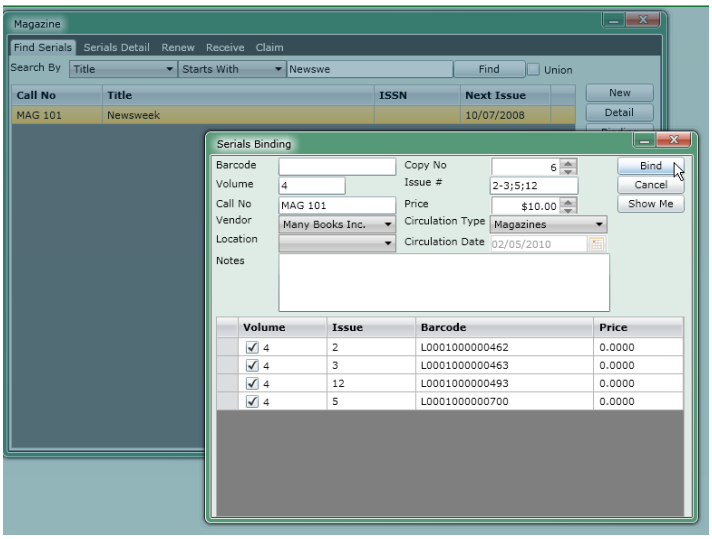
Once the Routing List has been created the Routing feature can be used to route issues of that serial.

1. Click **Catalog > Serials > Routing.**
2. Scan or manually enter the barcode of the issue for routing.
3. Select the Routing List desired from the dropdown box.
4. The list will be visible in the grid below.
5. Click Routing.
6. Check out the item.
7. A pop-up message will inform user that the issue status has been changed to Routing.
8. If the item is being signed out to individuals, user will be asked to confirm which patron the item will be signed out to first.

Binding Serials

Staff can send selected volumes and issues to bindery.

1. Click **Catalog > Serials > Find/Add Serials.**
2. Search for and select the serial title to send to bindery.



3. Click Binding.
4. Select the items in the grid for binding.
5. Enter the barcode for the bound serials or the system will automatically generate a barcode.
6. Click Bind (this prevents the selected issues from being circulated).
7. Print the barcode label for the bound volume and apply to the cover for circulation (instructions for printing barcodes is in the section following).
8. Reports for additional serials transactions are found in **Reports > Miscellaneous** and include: Subscription Costs.

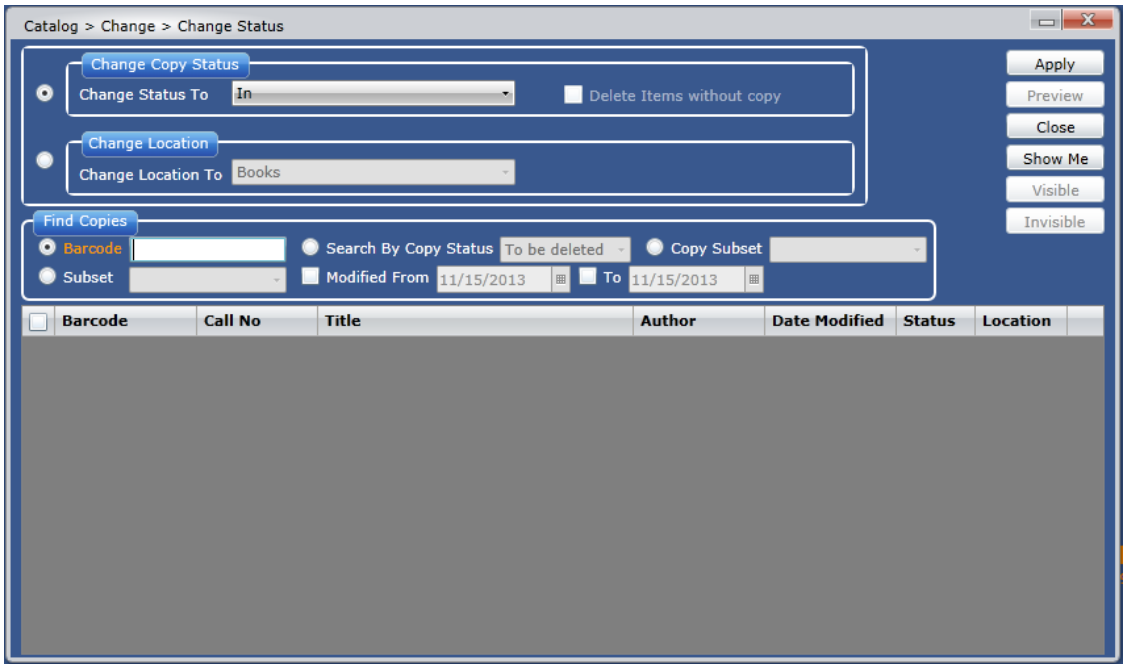
Change

This section of the catalog module allows you to organize your search criteria in order to make changes on very specific aspects of your cataloging records including: copy status, home library, and circ type. You may also choose to move copies, merge titles, and create copy subsets rather than item subsets in the Find/Add window. You may also choose to rescan barcodes and add copies efficiently to item records.

Change Status

The status of items can be changed by barcode, subset, or Copy Status from this window. Item location can also be changed in this window.

1. Click **Catalog > Change > Status.**
2. Input or scan in the barcode or select a subset.
3. Check the box beside the copies to change.

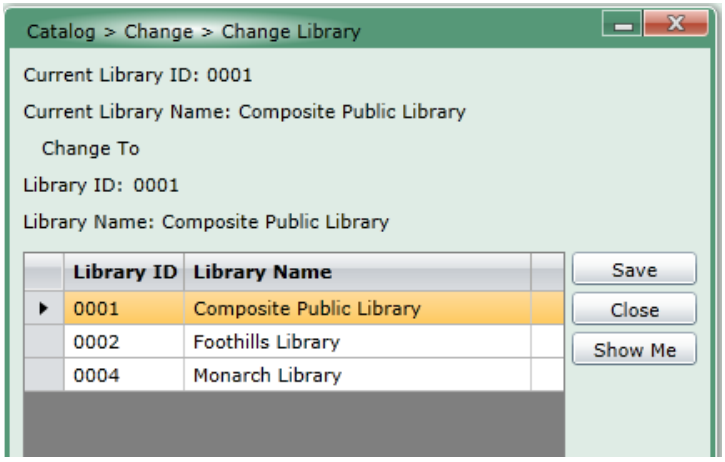


4. Change the status selection.
5. Click visible or invisible to change whether or not copies appear in the OPAC.
6. The location can also be changed by selecting the Change location radio button.
7. Click Apply to save changes.

Change Library

This function allows a district administrator to change the current library without having to log out of the system and then log back in.

1. Click **Catalog > Change > Library.**
2. To change the library, select the library name on the grid and click Save.
3. Now the system will treat the login user as belonging to the selected library for Circulation and Cataloging.

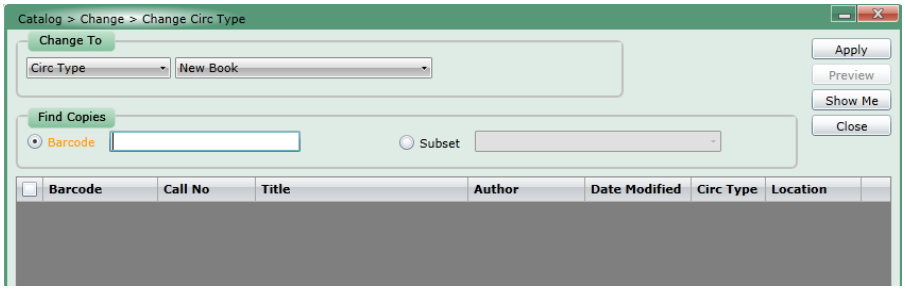


Circ Type

This feature allows changes to Circulation Type and Location of items.

1. Click **Catalog > Change > Circ Type**.

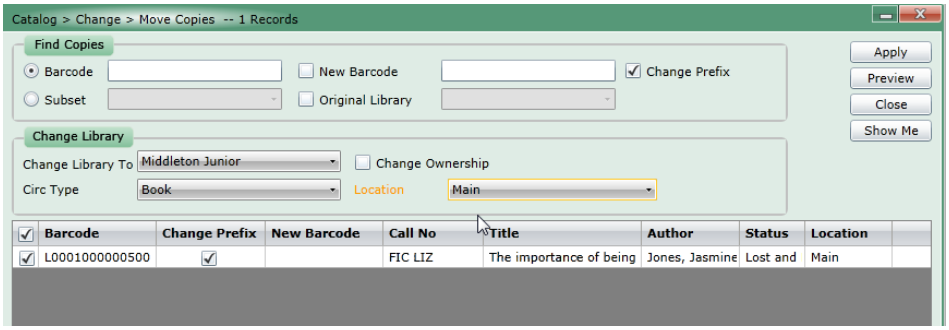
2. Input a barcode or select a subset.
3. Select either Circulation Type or Location.
4. Select the Change To drop downs.
5. Click Apply to save changes.



Move Copies

The move copies feature moves copies between libraries in a consortium.

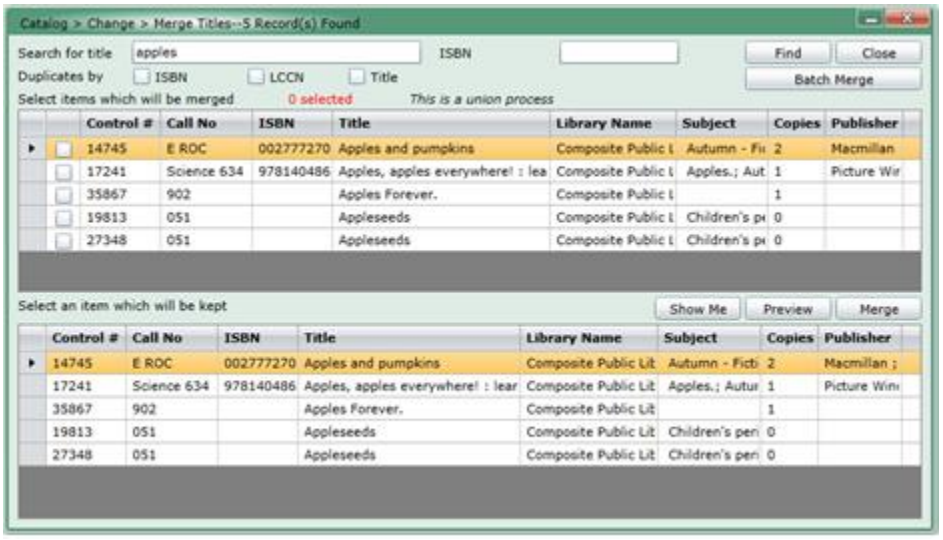
1. Click **Catalog > Change > Move Copies**.
2. Search the copies to move by inputting the barcode. Alternatively, copies can be grouped as a subset and selected.
3. Specify the library to move the records to by selecting it from the dropdown list.
4. The Circulation Type and the New Location can be specified.
5. A new barcode for a copy can be added by checking the New Barcode checkbox and entering the desired barcode number.
6. Select the copies for moving from the grid.
7. Click Apply.



Merge Titles

When items have been duplicated by ISBN, LCCN or title, they can be merged to eliminate redundancy.

1. Click **Catalog > Change > Merge Titles.**
2. Select matching criteria for duplicate titles (i.e. ISBN, LCCN, and Title).
3. Leave the title field blank while selecting ISBN, LCCN or Title to return all matches.
4. Specify the Search Criteria and click Find.
5. The Library Name of the titles being merged will be listed beside the title in both the items which will be merged table and the item which will be kept table.
6. Select the titles by checking the box in the top grid to merge them.
7. Select the title that will serve as the record for the merged titles from the bottom grid.
8. Click Merge.
9. The items will now become merged into a single title with the appropriate number of copies.



Create Copy Subset

Copy Subsets are like item subsets but refer to copies not item records.

1. Click **Catalog > Change > Copy Subset**.
2. Use the radio button Search and then specify the criteria and click Find to locate the copies for the subset.
3. Use the radio button Scan Barcodes to scan all of your Copy Subset into a list.
4. To select multiple records in the grid, click the first record and hold down Ctrl, while selecting the copies for the subset.
5. Click Subset.
6. To include all the copies displayed in the grid, click Subset All.

Tip: Copy subsets can be used in printing barcode/spine labels.

Rescan Barcode

The Rescan barcode process allows for both adding copies to items and updating barcodes on sections of the collection. A range of items can be rebarcoded using this feature.

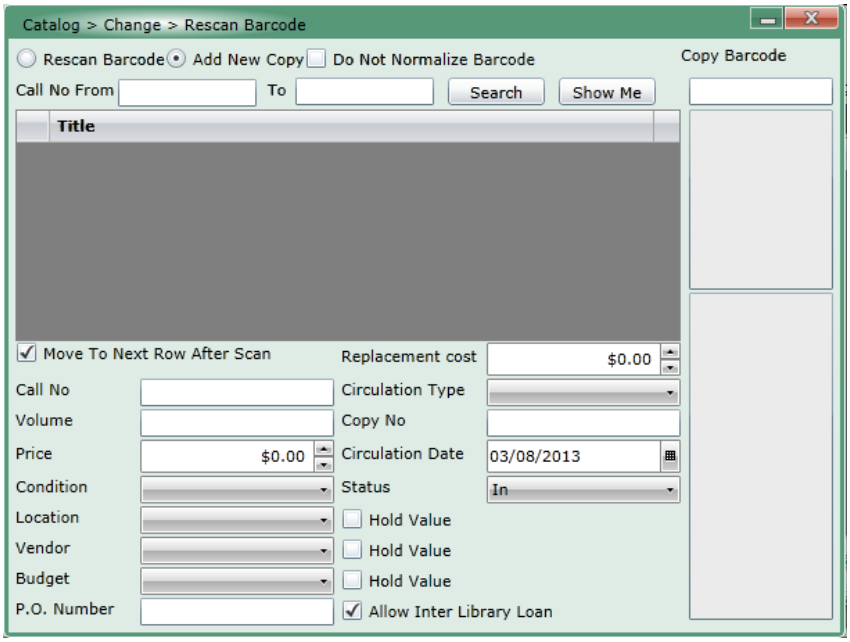
1. Click **Catalog > Change > Rescan Barcode**.
2. Select Rescan Barcode.
3. Select the re-barcode call number range and click Search.
4. Enter the values needed into the copy information fields.
5. Select the first barcode for rescanning in the list.
6. Next click the Copy Barcode field and scan the barcode.
7. Repeat above steps for each item on the list.
8. Continue until re-barcoding is complete.

Add New Copy

Add copies to a title from a call number range.

1. Click **Catalog > Change > Rescan Barcode**.
2. Select Add New Copy.
3. Select the call number range for adding copies.
4. Select the title that copies should be added to.
5. Click Copy Barcode field.

6. Scan in additional copies.
7. Repeat steps 4-6 until the process until all copies have been added.



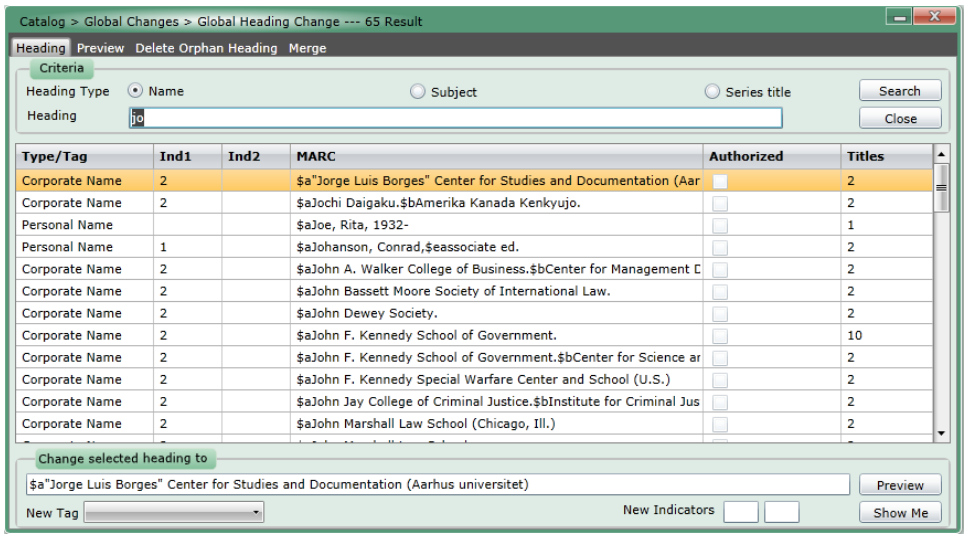
Global Changes

Important: Global changes cannot be reversed. It is strongly advised that a backup of the database is completed prior to using this feature.

Heading Global Change

Global heading change makes global changes to author/subject/title fields in the MARC record. This feature provides the opportunity to correct tags and subfields that are not consistent. Tags and indicators can also be modified during this process.

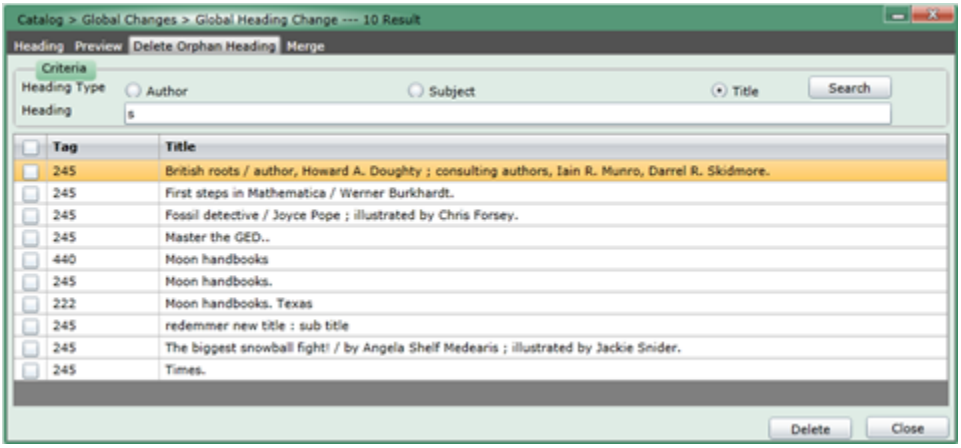
1. Click **Catalog > Global Change > Heading Global Change**.
2. Choose the heading type (i.e. Name, Subject, or Series title) by selecting the appropriate radio button.
3. Enter search term into the Heading field.
4. Click Search.
5. From the Heading list, select the heading to change.
6. Edit the heading in the change selected heading list to field.
7. The tags and indicators can be similarly changed using the drop down menus.
8. To change the heading and keep the existing tag and indicators, select the same tag and leave the indicators blank.
9. To change the heading and keep the existing tag but change the indicators, select the same tag, specify the new value and new indicators.
10. Click Preview to see the old and new tag and heading.
11. If the changes are correct, click Apply to save the changes.


Catalog > Global Changes > Global Heading Change --- 65 Result
Heading
Preview
Delete Orphan Heading
Merge
Criteria
Heading Type
Name
Subject
Series title
Search
Heading
jo
Close
Type/Tag
Ind1
Ind2
MARC
Authorized
Titles
Corporate Name 2 $a"Jorge Luis Borges" Center for Studies and Documentation (Aar 2
Corporate Name 2 $aJochi Daigaku.$bAmerika Kanada Kenkyujo. 2
Personal Name $aJoe, Rita, 1932- 1
Personal Name 1 $aJohanson, Conrad,$eassociate ed. 2
Corporate Name 2 $aJohn A. Walker College of Business.$bCenter for Management D 2
Corporate Name 2 $aJohn Bassett Moore Society of International Law. 2
Corporate Name 2 $aJohn Dewey Society. 2
Corporate Name 2 $aJohn F. Kennedy School of Government. 10
Corporate Name 2 $aJohn F. Kennedy School of Government.$bCenter for Science ar 2
Corporate Name 2 $aJohn F. Kennedy Special Warfare Center and School (U.S.) 2
Corporate Name 2 $aJohn Jay College of Criminal Justice.$bInstitute for Criminal Jus 2
Corporate Name 2 $aJohn Marshall Law School (Chicago, Ill.) 2
Change selected heading to
$a"Jorge Luis Borges" Center for Studies and Documentation (Aarhus universitet)
Preview
New Tag
New Indicators
Show Me

Delete Orphan Heading

The Delete Orphan Heading tab works with author, subject, and series title headings that do not have any bibliographic records linked to them. They may result from bibliographic records becoming weeded over time. Any associated heading of a weeded item needs to be deleted separately from the bibliographic item from this menu.

1. Click **Catalog > Global Change > Heading Global Change**.
2. Click the Delete Orphan Heading tab.
3. Choose the heading type (i.e. Author, Subject, or Series title) by selecting the appropriate radio button.



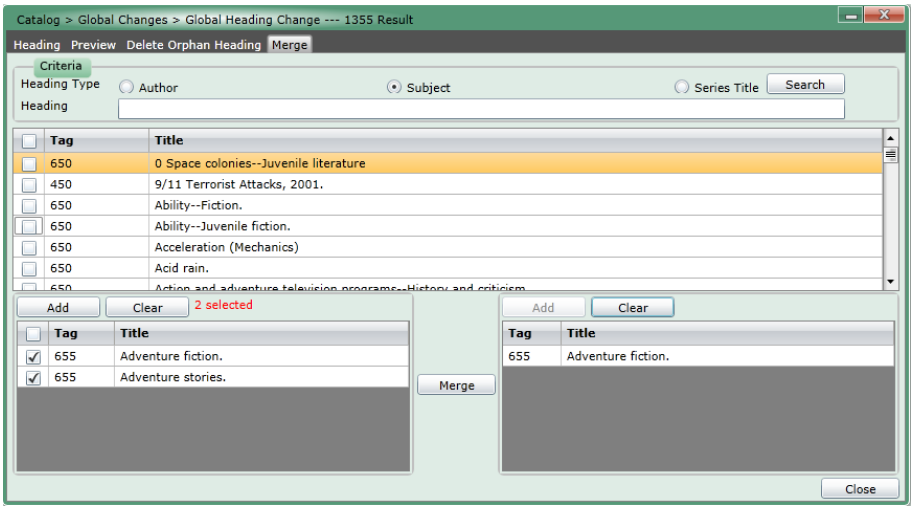
4. Click Search.
5. From the Heading list, select the heading to delete
6. Click Delete.

Heading Merge

The Heading Merge tab allows for multiple headings to become merged into a single heading

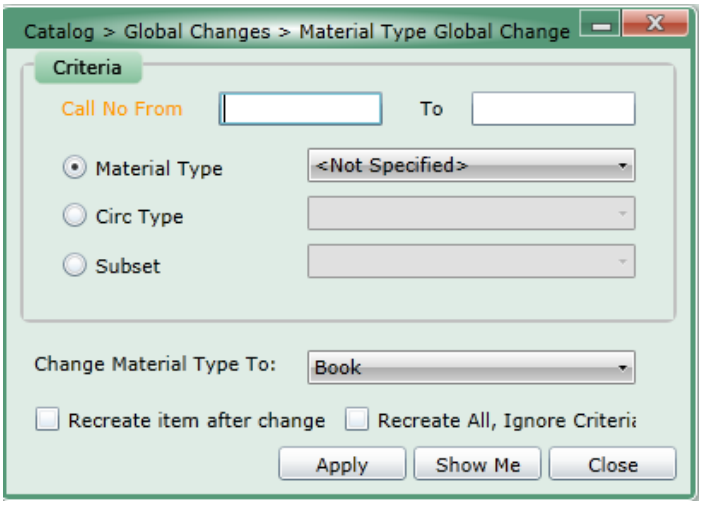
1. Click **Catalog > Global Change > Heading Global Change**.
2. Click the Merge tab.
3. Find the first heading for the merge by Author, Subject, or Series Title.
4. From the search results below, select the header(s) for merge by checking the box to the left.

5. Click Add located in the lower left-hand side on the screen.
6. Once there are at least two publishers in the Selected (at least two) box the new name to be merged under can be selected.
7. Select the heading you wish to keep in the lower left-hand grid, click Add located near the bottom right-hand grid on the screen.
8. The new publisher should appear in the right-hand box.
9. Click Merge.
10. The headings in the left-hand box will now merge under the heading name listed in the right-hand box. When the process finishes, both boxes will be cleared.



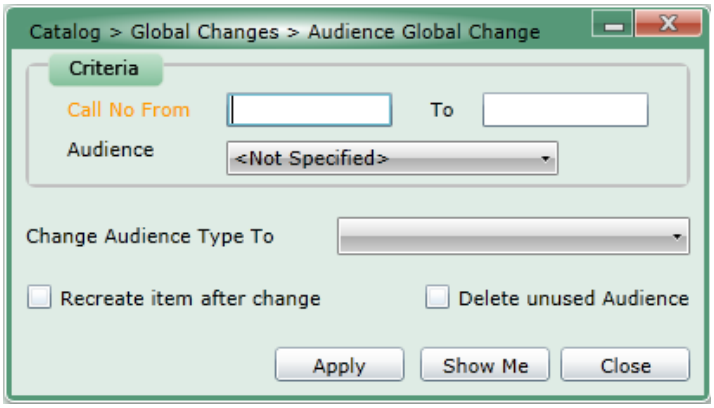
Material Type Global Change

1. Click menu **Catalog > Global Change > Material Type Global Change**.
2. Specify where the material type global changes will occur. The changes can be limited by the following criteria:
   2.1. Call Number Range
   2.2. Material Type
   2.3. Circulation Type
   2.4. Subset
3. Select the Material Type Changed To from the dropdown list.
4. Do not select The Recreate Item after Change checkbox. Insignia will provide instructions when selecting this checkbox.
5. Click Apply.
6. A dialog box will appear on screen when the process has been completed.



Audience Global Change

The Audience Global Change process allows changes to the Audience Level. This is helpful if there are duplications or wrong Audience Levels.



1. Click **Catalog > Global Change > Audience Global Change**.
2. The changes can be limited by:
   2.1. Call number range
   2.2. Audience Level
3. Select the Audience Type to Change To from dropdown list
4. Do not select Recreate item after change.
5. Select "Delete unused Audience" to remove any audience not applied to copies.
6. Click Apply.
7. A dialog box will prompt with the number of records that will be changed. Click Yes to continue or No to cancel.

MARC Global Editor

This feature is for making a variety of global changes to the bibliographic records.

6. Click **Catalog > Global Change > MARC Global Editor**.
7. Select Change Search Result or Change All. Change All will all records in the system and change them.
8. Select all the records for applied changes.
9. Specify the criteria:
   9.1. Copy Tag:

9.1.1. Copy data from Old Tag to New Tag or Move data from Old Tag to New Tag when Move Over check box is selected.

9.2. Copy Subfield:

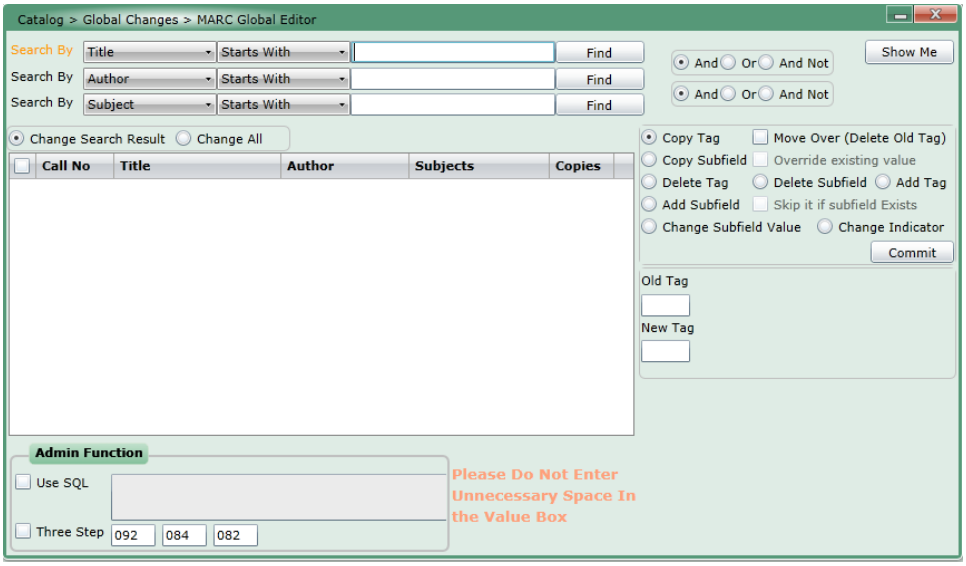
9.2.1. Copy only a subfield of Old Tag to New Tag subfield, if Override Existing value is selected then it will override rather than adding it.

9.2.2. To base the change only where old value matches a given string then specify the string and how it should be matched, Exact Match, Start With or End With.

9.2.3. Specify the new value for change.

9.2.4. To keep the old value, select Keep Old Value.

9.2.5. To change the old value, specify the values to change from and to and how it should be changed: Change Left, Change Right, Append At The End, or Insert In The Beginning.



9.3. Delete Tag:

9.3.1. To Delete a tag select Delete Tag and also specify if needed what value should be matched when the Tag is deleted.

9.3.2. If there are multiple tags, to keep only one, select the checkbox Keep One.

9.4. Delete Subfield:

9.4.1. To Delete a subfield select Delete subfield and also specify if needed the value match when deleting the subfield.

9.4.2. To keep only one, select the checkbox Keep One.

9.5. Add Subfield:

9.5.1. To add a subfield to a Tag, specify the tag and subfield and the value. To skip subfields select checkbox for Skip.

9.6. Change Subfield Value or Change Indicator Value:

9.6.1. Change the value for a subfield or indicator for a given tag.

9.6.2. For this change to be based on only where old value matches a given string, and then specify the string and how it should be matched, Exact Match, Start With or End With.

9.6.3. Specify the new value to be changed to.

9.6.4. To keep the old value as well, then select Keep Old Value.

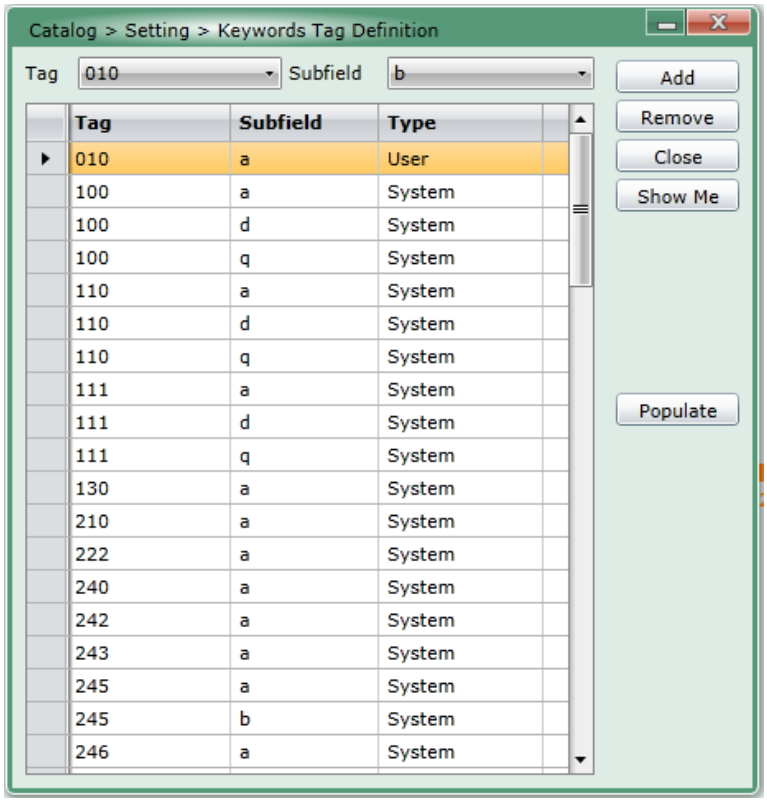
9.6.5. To change the old value, specify what it should change from, and to what value and how it should be changed: Change Left, Change Right, Append A The End, or Insert In The Beginning.

9.6.6. Click Commit.

10. A dialog box will prompt the number of records to be changed and require confirmation of the changes.

Keywords Tag Definition

Keywords Tag Definition enables which tags and subfields are indexed in keyword searches. This setting is system based.



Add

1. Click **Catalog > Setting > Keywords Tag Definition**.
2. Select the tag to add from the Tag dropdown list.
3. Select the subfield to add from the Subfield dropdown list. **Note:** RDA Tags are now searchable in the OPAC when set up from this menu.
4. Click Add.
5. Repeat above for as many tags as require changes.
6. Click Populate to rebuild the keyword index.

Remove

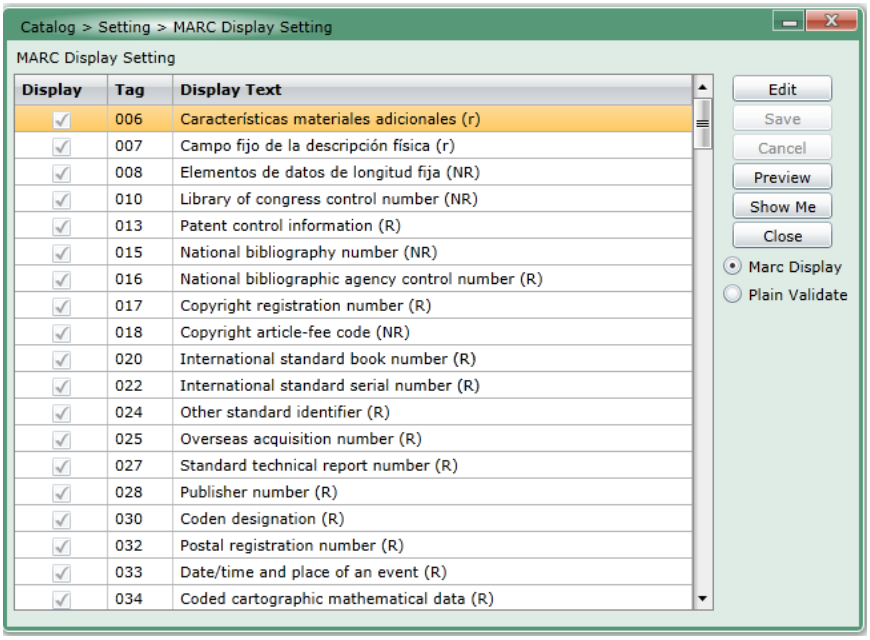
1. Highlight the tag to remove from the list.
2. Click Remove.
3. Repeat above for as many tags that require removal.
4. Tags with the type System cannot be removed. Only tags that are user defined can be removed.
5. Click Populate to rebuild the keyword index.

MARC Display Settings

The MARC fields visible to patrons in the Web OPAC can be selected using this feature. This setting is system based.

1. Click **Catalog > Setting > MARC Display Setting**.
2. Click Edit.

3. Selecting MARC Display will show tags in a MARC format.
4. Selecting Plain Validate will validate tags before saving the record in the MARC Expert interface.
5. Check the tabs to appear in the OPAC.
6. Click Save.


Catalog > Setting > MARC Display Setting
MARC Display Setting
Display
Tag
Display Text
006 Características materiales adicionales (r)
007 Campo fijo de la descripción física (r)
008 Elementos de datos de longitud fija (NR)
010 Library of congress control number (NR)
013 Patent control information (R)
015 National bibliography number (NR)
016 National bibliographic agency control number (R)
017 Copyright registration number (R)
018 Copyright article-fee code (NR)
020 International standard book number (R)
022 International standard serial number (R)
024 Other standard identifier (R)
025 Overseas acquisition number (R)
027 Standard technical report number (R)
028 Publisher number (R)
030 Coden designation (R)
032 Postal registration number (R)
033 Date/time and place of an event (R)
034 Coded cartographic mathematical data (R)
Edit
Save
Cancel
Preview
Show Me
Close
Marc Display
Plain Validate

MARC Import Options

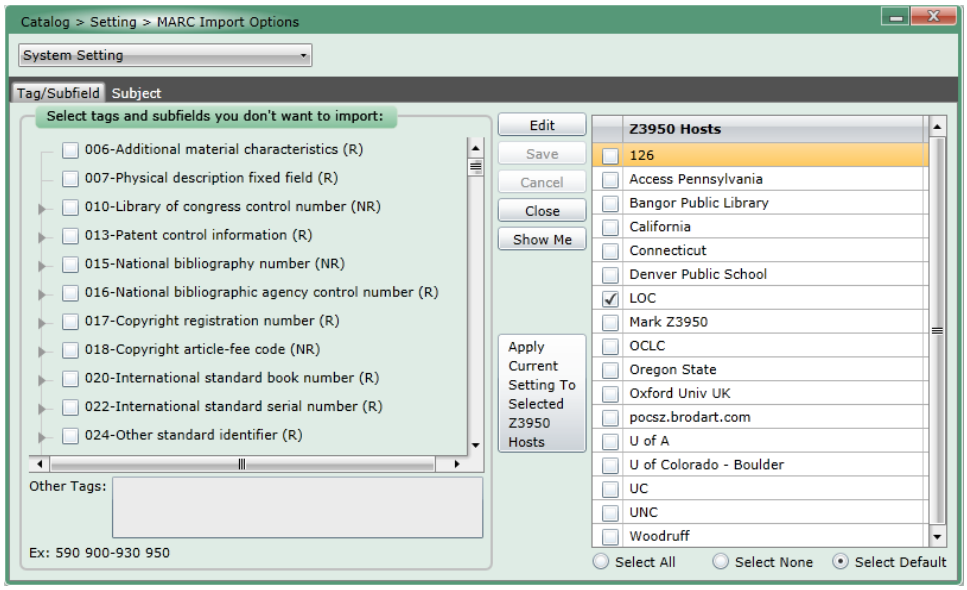
The MARC record information imported into ILS can be specified. These specifications can be system wide or set for individual Z39.50 Hosts using this feature.

Tip: This feature allows the user to select the MARC tags that should NOT be imported.

Tag/Subfield

This specifies which tags should not be imported.

1. Click **Catalog > Setting > MARC Import Options.**
2. To specify this for a particular Z39.50 host, select the host from the dropdown list.
3. To make the change for all hosts select System Setting.
4. Click Edit.
5. Select the tags or subfields will **not** import when importing MARC records.
6. The Other Tags field will list a range of tags that do not import. The dash separates the range and the space separates individual tags.
7. Click Save.
8. To apply to some or all hosts, select the servers and then click Apply.



Subject Headings

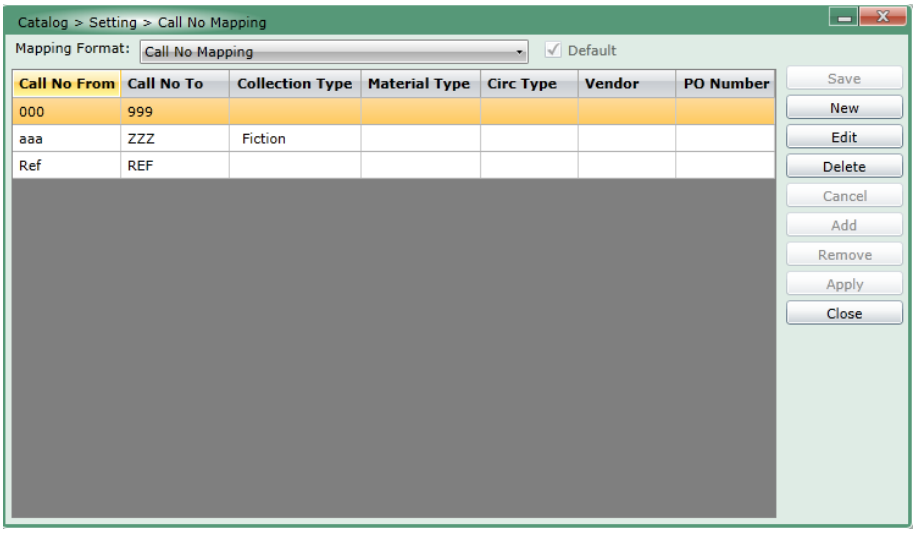
Specify tags to remove from import.

1. Click **Catalog > Setting > MARC Import Options.**
2. Select the Subject tab.
3. Click Edit.
4. Select the subject headings Not to Be Imported (this option is system based).
5. Click Save.

Call No Mapping

Call No Mapping adds predefined fields to new records cataloged in Basic Info based on the call number entered. This feature will only set fields in new item records created from Basic Info, not Z39.50 for previously created records.

1. Click **Catalog > Setting > Call No Mapping.**
2. Click New.
3. Fill out the Call No range for preset fields.
4. Fill out Collection Type, Material Type, Circ Type, and any other fields that will become predefined within the call number range.
5. Click Save.
6. Click Edit to change any previous call no. mapping.
7. Click Delete to remove any previous call no. mapping.


Catalog > Setting > Call No Mapping
Mapping Format:
Call No Mapping
Default
Call No From
Call No To
Collection Type
Material Type
Circ Type
Vendor
PO Number
000
999
aaa
ZZZ
Fiction
Ref
REF
Save
New
Edit
Delete
Cancel
Add
Remove
Apply
Close

Patron Module

Insignia Library System maintains updated profiles of all patrons using the library. This includes general information about the patron, loan history, circulation type, and security information. Insignia Library System can be configured so that patrons can manage their profiles themselves from the OPAC. Restricting circulation activities to other library staff members can be done by setting permissions to patrons in **Administration > Patron Circulation Types**.

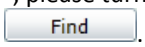
Patron information can be imported from any Student Information System or can be added manually.
If Insignia Student Information System is in use, then patron information is automatically loaded and updated in real-time from the Student Information System. The Patrons Module contains the following:

1. Find / Add Patron
2. New Patron from Template
3. Barcode
4. Homeroom
5. Patron Group
6. Clean Up Data
7. Merge Patron
8. Password

Find/Add Patron

The Find/Add patron window is a very powerful window. Patron information can be added, edited, and deleted using this feature. Unlimited patrons can be added to the system.

Find

1. Click **Patrons > Find/Add Patron.**
2. Select one of the Search By criteria from the first dropdown or click <ALL> to see all records.
3. Select one of the Search By criteria from the second dropdown.
4. Patron Names can be searched without typing the full name (i.e. Ali Wi searches Alicia Wick).
5. The patron's barcode can be searched by "Starts With", "Any Match", and "Ends With". If using "Ends With", please turn on the Catalog Configuration Setting "Patron Quick Barcode".
6. Click 

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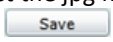
New

1. Click **Patrons > Find/Add Patron.**
2. Click

.
3. Enter the information available or leave the field blank to automatically generate a barcode.
4. To add a patron's picture, click

.
5. Select the jpg file under than 15K for optimal results from the window.
6. Click 

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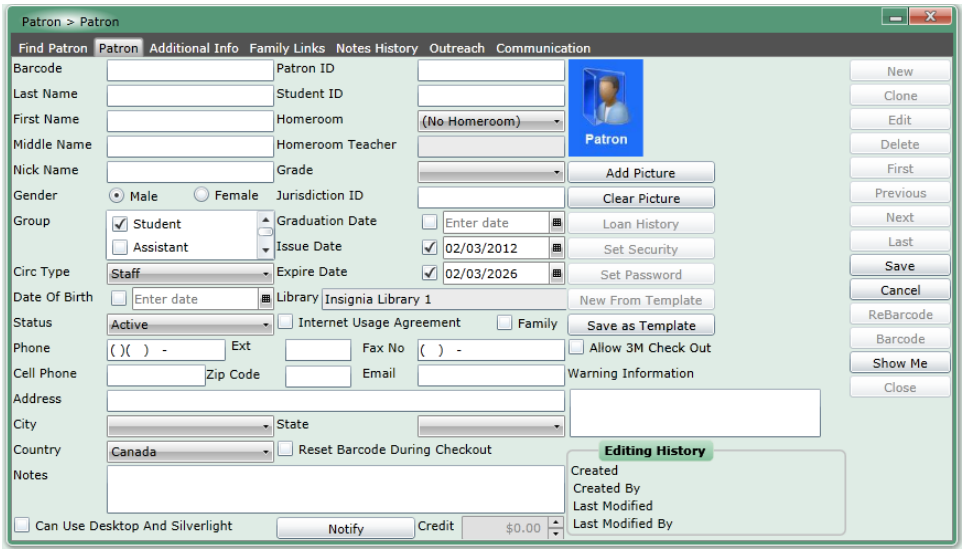
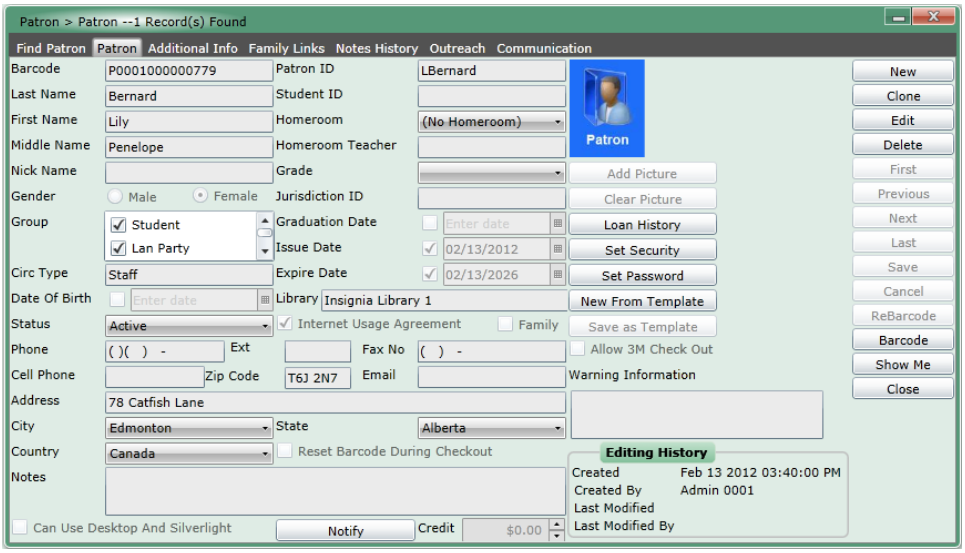


Edit

1. Click **Patron > Find/Add Patron**.
2. Search for the patron using the search fields.
3. Double click the patron to open their information.
4. Click Edit.
5. Edit the required fields.
6. Fill in the required dropdown menus which can be modified from the Parameters window.
7. Click Save.
8. The Patron screen clones patron information, deletes a patron, scrolls through the patron search results and prints barcodes by clicking Barcode.



Notes

Click this button to view all notes added to patron record. These notes are internal and are added in the Notes section of the Find Patron tab.

Delete

1. Click **Patron > Find/Add Patron.**

2. Find patron using search tools.
3. Select patron to delete.
4. Click Delete.
5. Confirm deletion.

Clone

Cloning patron information is useful when there are patrons to be added with similar information, such as siblings.

1. Click **Patron > Find/Add Patron**.
2. Find the patron to copy.
3. Double click the patron name.
4. Click Clone.
5. Make the necessary changes.
6. Click Save.

Loan History

This feature enables tracking of borrowed items. Textbooks on loan will have an asterisk beside them to denote that they are textbooks.

1. Click **Patron > Find/Add Patron**.
2. Find the patron.
3. Double click the patron name.
4. Click Loan History.

Tip: The Track Loan History option must be enabled by selecting the checkbox located on the Circulation tab in the Configuration screen. By default, this option is turned off.

Items on Loan

1. Click Patron > Find/Add Patron.
2. Find the patron.
3. Double click the patron name.
4. Click Loan History.
5. Select the Items on Loan tab.
6. Use the grid to organize the information.

Check Out From Current Library

Will show the books currently checked out from the current library only.

Books From Current Library

Will show all the books ever checked out from the current library only.

Show Library Books

Selecting this checkbox will show library books in checkout grid.

Show Asset

Selecting this checkbox will show assets in checkout grid.

Show Textbooks

Selecting this checkbox will show textbooks in the checkout grid.

Reserve Information

1. Click Patron > Find/Add Patron.
2. Find the patron.
3. Double click the patron name.
4. Click Loan History.

5. Select the Reserve Information tab.
6. Use the grid to organize the information.

Fine Information

1. Click Patron > Find/Add Patron.
2. Find the patron.
3. Double click the patron name.
4. Click Loan History.
5. Select the Fine Information tab.
6. Use the grid to organize the information.

Loan History

1. Click Patron > Find/Add Patron.
2. Find the patron.
3. Double click the patron name.
4. Click Loan History.
5. Select the Loan History tab.
6. Use the grid to organize the information.

Current Library Books Only

Will show the books currently checked out from the current library only.

Books From Current Library

Will show all the books ever checked out from the current library only.

Show Library Books

Selecting this checkbox will show library books in checkout grid.

Show Asset

Selecting this checkbox will show assets in checkout grid.

Show Textbooks

Selecting this checkbox will show textbooks in the checkout grid.

Fine Paid

1. Click Patron > Find/Add Patron.
2. Find the patron.
3. Double click the patron name.
4. Click Loan History.
5. Select the Fine Paid tab.
6. Use the grid to organize the information.

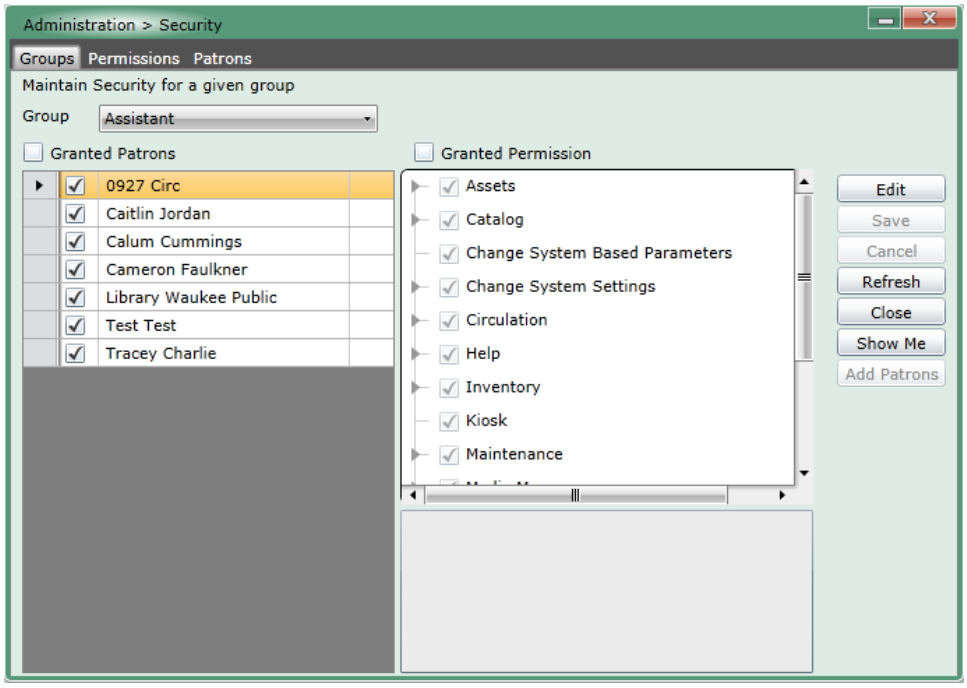
Patron Security

It is strongly recommended that permissions are assigned to groups only. After group level security has been assigned, patrons should be assigned to their appropriate groups. Extra privileges can then be assigned to individual patrons over and above their normal group permissions. Insignia Library System supports both security at a user level and a group level. Therefore, permissions can be set for an individual patron or for a group of patrons. Learn more about security under Security Settings.

Set Security

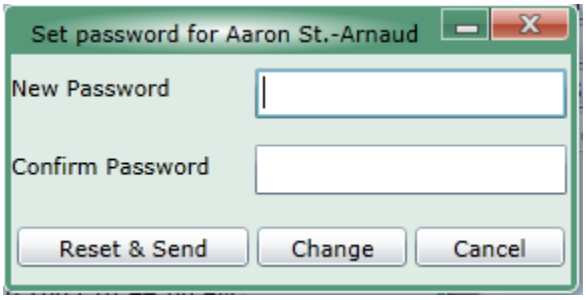
7. Click Patron > Find/Add Patron.

8. Find or create the patron whose security permissions need to be set.
9. Click Set Security.
10. Click Edit.
11. Select the groups this patron belongs to (by checking the box under the Member of list).
12. Permissions can be set for this patron at an individual level, but it is recommended permissions are assigned to a group initially and then make the patron a member of that group to set permissions.
13. Click Save.



Set Password

If the library has been configured to allow patrons to change their personal information, each patron will have a login password. The library system can be configured to set a default password for each patron.
Reset and Send will send a random password to the patron's e-mail account.



Change

1. Click **Patron > Find/Add Patron**.
2. Find the patron.
3. Double click the patron.
4. Click Set Password.
5. Type in a new password.
6. Click Change.

7. Click Save.

Find/Add Patron Additional Buttons

Delete All
Delete all selected patrons.

Subset
Allows you to add selected patron to a subset.

Subset All
Allows you to add all selected patrons to a subset.

Unarchive
Unarchive the selected patron.

Change Library
Change the library of the selected patron.

Preview
Print out a list of all patrons in the current search.

ShowMe
Play Show Me video related to the Find/Add patron window.

Remove
Will remove the selected patron from the subset.

Clear
Will clear the subset of all patrons.

Change
Will allow you to change patron's expiry date, Grade, Homeroom or Status. This is a subset-related feature.

Notify
Select the Notify button to send out an email listing items checked out or overdue by the patron. A dialog box will confirm if the email was successfully sent.

Find/Add Patron Fields and Checkboxes

Internet Usage Agreement
If checked, this patron will be able to book computers.

Family
If checked, this card becomes a family card and can have other family members attached.

Reset barcode during checkout

This will force the patron to change their barcode the next time they are checking out books. Once scanned in, they will be prompted for a new patron barcode.

Allow 3M Checkout

If selected, this will enable the patron to use 3M checkout stations.

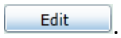
Can use Desktop and Silverlight

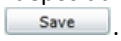
This field needs to be checked for the selected patron to login to ILS.

Additional Information

The Additional Info tab tracks additional patron information. This feature can track deposits for items, custom fields, if loan history is tracked, and autodialer phone settings. The administrator can assign patrons to manage more than one library from this tab. The custom field names are customizable by logging in a district administrator and then click menu **Administration > System Setting > Custom Setting**.

Deposit Amount / Refund Amount

1. Click **Patrons > Find/Add Patron**.
2. Use the search tools to locate the patron.
3. Double click the patron name.
4. Click Additional Info tab.
5. Click 

.
6. Enter deposit amount / refund amount.
7. Click 

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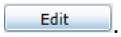
Tip: The deposit can be refunded by repeating steps 1 to 3, clicking Edit, entering the refund amount, and clicking save.

Custom Patron Field (Patron Field 2, Patron Field 3, and so on)

1. Click **Patrons > Find/Add Patron**.
2. Use the search tools to locate the patron.
3. Double click the patron name.
4. Click Additional Info tab.
5. Click 

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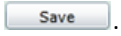
6. Enter the values in the appropriate patron field.
7. Click 

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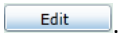
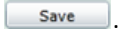
Patron Working Libraries

1. Click **Patrons > Find/Add Patron**.
2. Use the search tools to locate the patron.
3. Double click the patron name.
4. Click Additional Info tab.
5. Click 

.
6. Click the checkbox beside the library names selectable in this patron's Change Library window.
7. Click 

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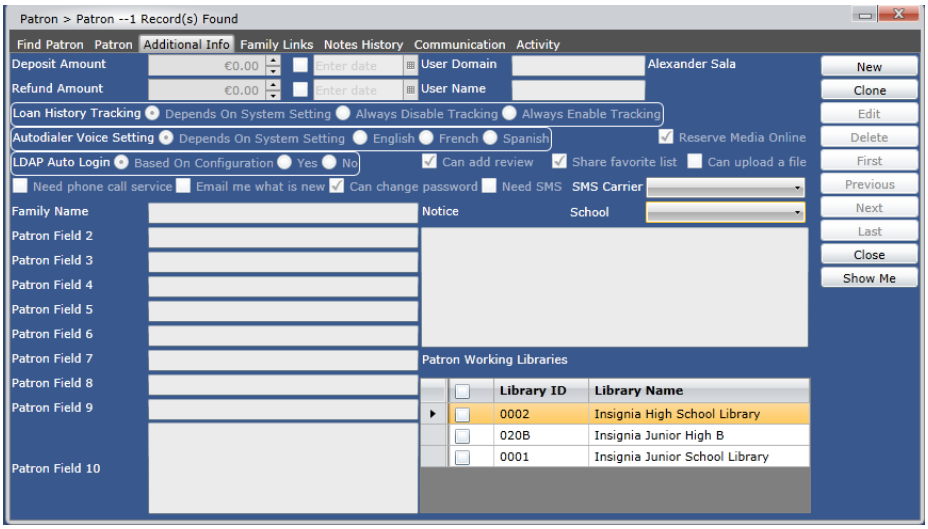
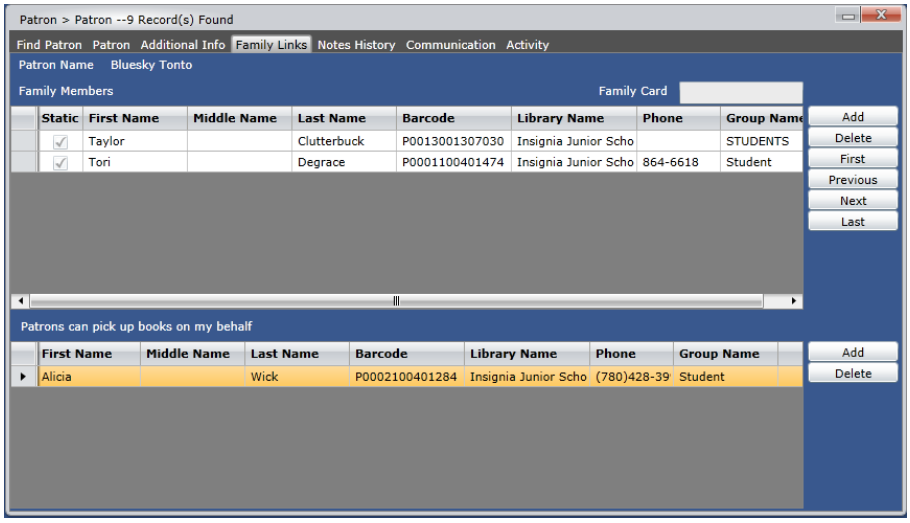


Family Links

Family links can be added to link patrons of a specific family together.

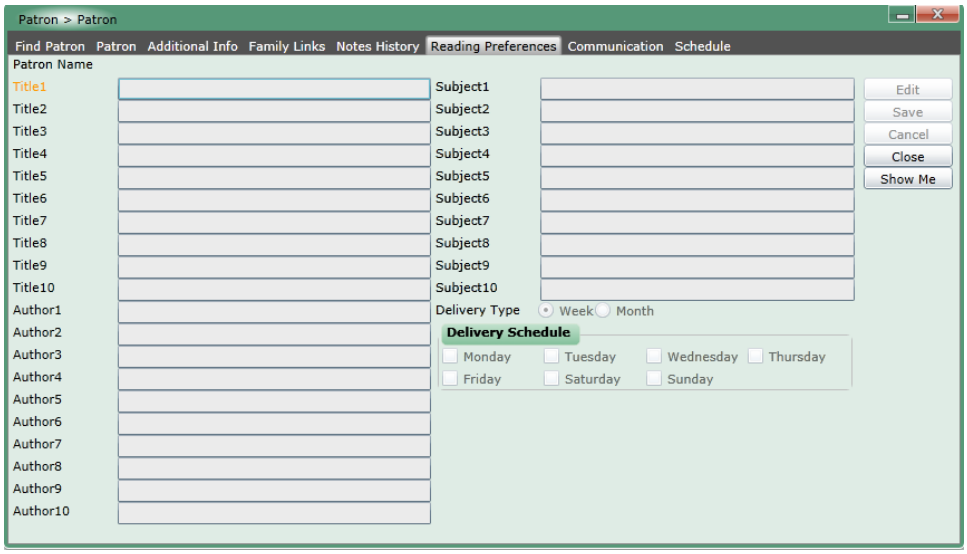
1. Click **Patron > Find/Add Patron**.
2. Click New.
3. Enter the name of the family into the first and last name boxes.
4. Make sure to select the Circ type and group information correctly.
5. Now check the family card check box.
6. Click Save.
7. Select the Family links tab.
8. Select one of the grids where patrons will be added:
    a. **Family Members**: This allows one barcode to track all circulations for one family.
    b. **Patrons who can pick up books on my behalf**: This notes whether or not one patron is allowed to pick up books on behalf of another.
9. Click Add.
10. Using the search box find family members to add.
11. Find and select patrons.
12. Click Apply.
13. Click OK.
14. Click Save.


Patron > Patron --9 Record(s) Found
Find Patron Patron Additional Info Family Links Notes History Communication Activity
Patron Name Bluesky Tonto
Family Members
Family Card
Static First Name Middle Name Last Name Barcode Library Name Phone Group Name
Taylor Clutterbuck P0013001307030 Insignia Junior Scho STUDENTS
Tori Degrace P0001100401474 Insignia Junior Scho 864-6618 Student
Add Delete First Previous Next Last
Patrons can pick up books on my behalf
First Name Middle Name Last Name Barcode Library Name Phone Group Name
Alicia Wick P0002100401284 Insignia Junior Scho (780)428-39 Student
Add Delete

Reading Preferences

This feature can recommend items to patrons they have not read by their reading preferences. The ILS generates a list of items based on information entered from titles, authors, and subjects. Items the patron has already borrowed will not be included on the reading preference list.

1. Click **Patron > Find/Add Patron**.
2. Find the patron's reading preference profile.
3. Click on the Reading Preferences tab.
4. Click Edit.
5. Specify the patron preferences.
6. Specify the Delivery Schedule.
7. Click Save.


Patron > Patron
Find Patron Patron Additional Info Family Links Notes History Reading Preferences Communication Schedule
Patron Name
Title1 Title2 Title3 Title4 Title5 Title6 Title7 Title8 Title9 Title10
Author1 Author2 Author3 Author4 Author5 Author6 Author7 Author8 Author9 Author10
Subject1 Subject2 Subject3 Subject4 Subject5 Subject6 Subject7 Subject8 Subject9 Subject10
Delivery Type Week Month
Delivery Schedule
Monday Tuesday Wednesday Thursday
Friday Saturday Sunday
Edit Save Cancel Close Show Me

Notes History

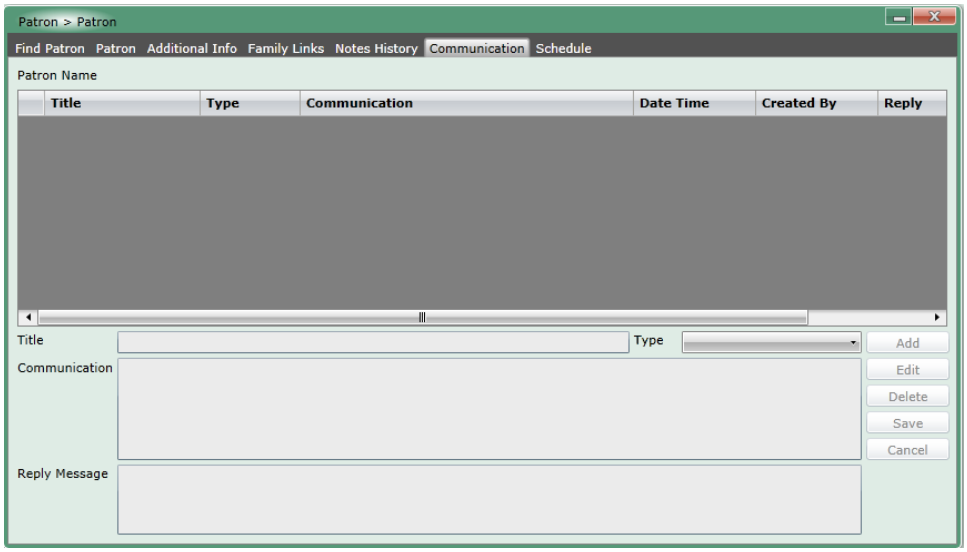
Use this tab to view all the history of the notes added to this patron record. These notes can be seen from the Check Out screen, shown in the second tab when you click the Patron Notes button.

Communication

This tab is used for the user to communicate to the patron through the patrons Web OPAC interface.

Tip: The message appears in the account of the patron on the OPAC.

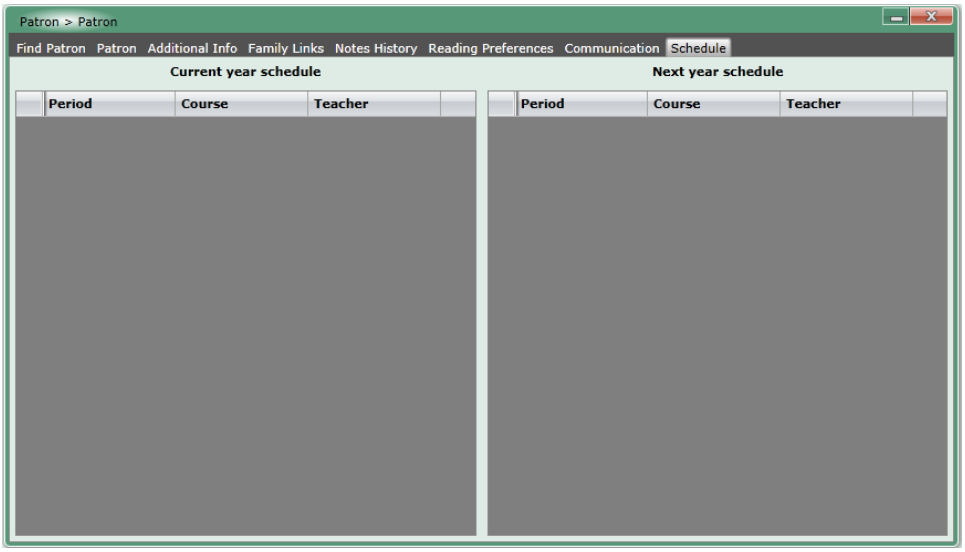
1. Click **Patron > Find/Add Patron**.
2. Find patron using search tools.
3. Double click patron name from search results.
4. Click Communication tab.
5. Enter information to communicate in Communication field.
6. Click Save.



Schedule

This can include the current year and next year's schedule.

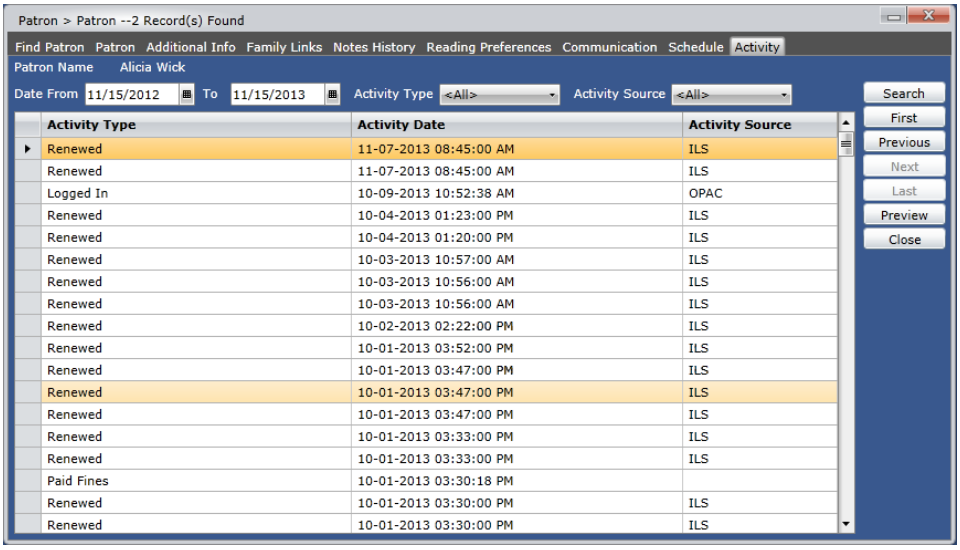
1. Click **Patron > Find/Add Patron**.
2. Find patron using search tools.
3. Double click patron name from search.
4. Click Schedule tab.



Activity

This can include a patron's activity from the ILS, OPAC, and Smart Phone App.

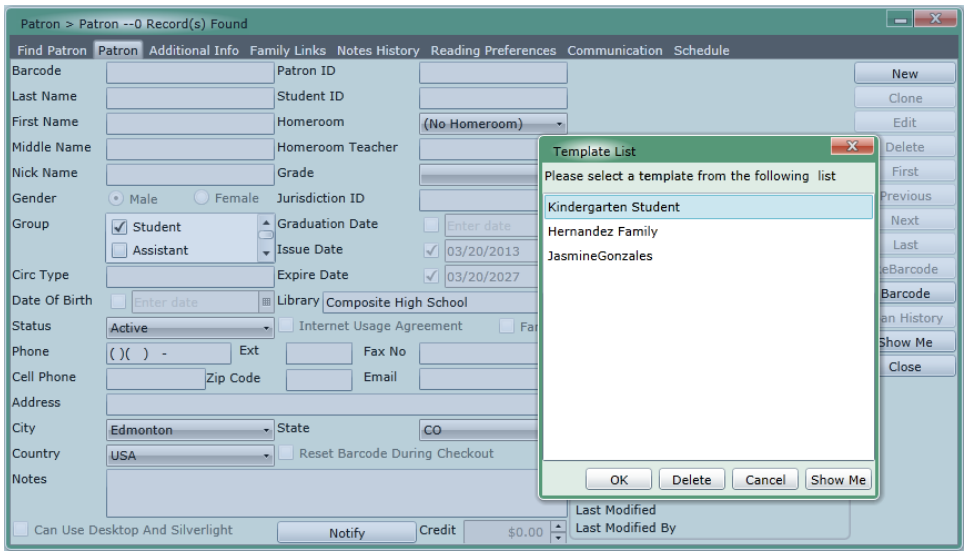
1. Click **Patron > Find/Add Patron**.
2. Find patron using search tools.
3. Double click patron name from search.
4. Click Activity tab.
5. The activity type along with the activity date will be listed first including Reserved, Renewed, Paid Fines, Logged In, and Updated Profile.



New Patron from Template

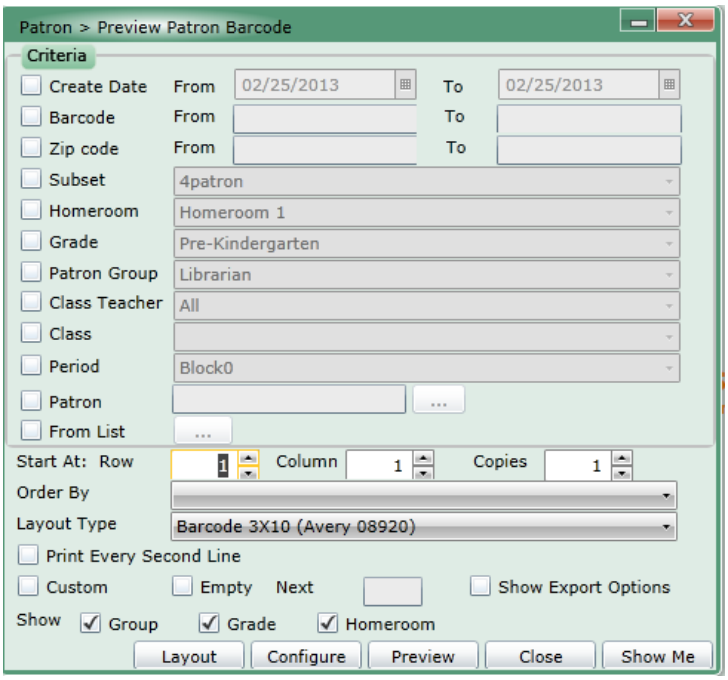
This selects a template with circ type, patron groups, address, and other patron fields already filled out. Find / Add Patron can save a patron's fields as a template by clicking Save as Template.

1. Click **Patron > New Patron from Template**.
2. Select template from the list.
3. Click OK.



Patron Barcodes

Patron barcodes can be printed from the ILS.



Preview

1. Click **Patron > Barcode**.
2. Select the limiting criteria to specify the barcodes to be printed.
3. Include the Group, Grade, or Homeroom on the barcode labels by checking the relevant checkboxes.
4. The starting row, starting column, and the number of copies can be selected.
5. Checking the Show Export Options checkbox allows saving or emailing barcodes in the print preview window.
6. Click Configure for barcode symbology configuration (once set, you don't need to adjust it again).

7. Click Layout to add new favorite barcode labels, adjust margins, and change font sizes.
8. Adjust the margins by use the Top and Left adjustments and unchecking the system default margin. Use a negative number to move the margins down and to the right.
9. Select the order the barcodes are to print by using the Order By dropdown menu.
10. Click Preview.
11. Click the printer icon to bring up the printer dialog box.
12. Select the printer you want to print from.
13. Please ensure to set the following two settings:
    13.1. Page Scaling needs to be set to None.
    13.2. Auto Rotate and Center needs to be Unchecked.

Custom

Custom barcodes can be printed. Library staff can choose which field will appear on barcodes, the order the fields are in, and their size. Check the custom box then click the custom button.

Importing Patrons from a File

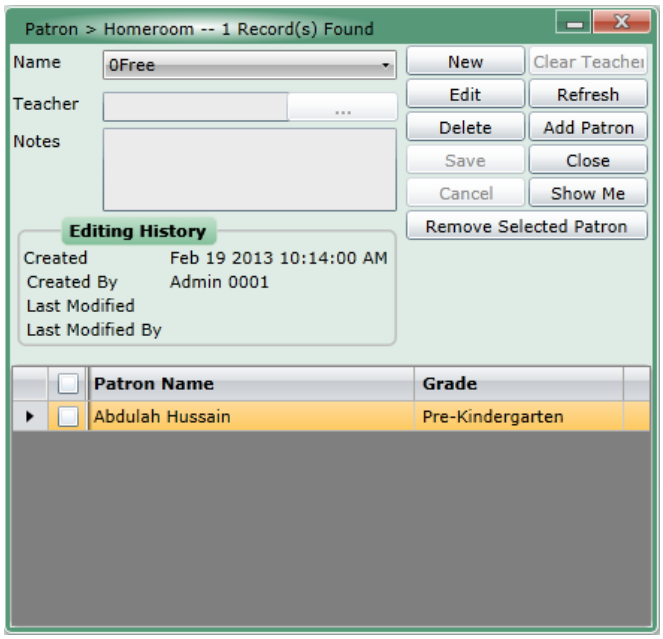
Staff can import data from a student information system. To learn more about how to import data from a file, see – Administration or call the Insignia support team.

Homerooms

Staff can create homerooms for their schools. This is very helpful when printing out overdue notices and other report information.

New

1. Click **Patron > Homeroom**.
2. Click New.
3. Enter the name of the homeroom.
4. Use ... to select the teacher.
5. Click Add Patron to select patrons.
6. Add any relevant notes.
7. To clear a teachers name without adding a new one, click the Clear Teacher button while in Edit mode.
8. Click Save.
9. Remove selected patron names from the homeroom by clicking Remove Selected Patron.



Delete

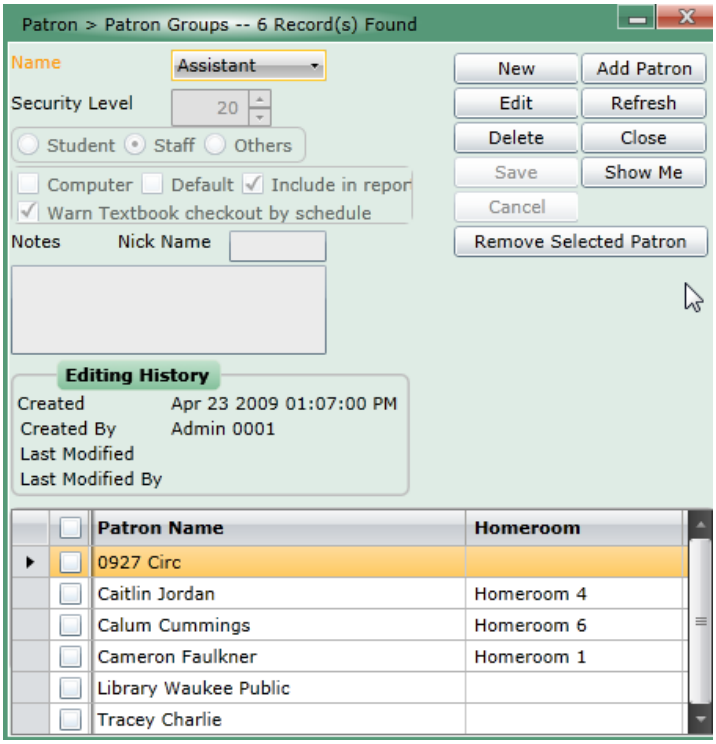
1. Click **Patrons > Homeroom**.
2. Select the homeroom to delete in the dropdown menu.
3. Click Delete.
4. Confirm your deletion.

Edit

1. Click **Patrons > Homeroom**.
2. Select the homeroom to edit in the dropdown menu.
3. Click Edit.
4. Make any changes needed.
5. Click Save.

Patron Group

ILS provides the ability to create and define different groups of patrons. This allows the system to display only relevant information on the screen. For example, if the group is Teachers, then the patron record will not display fields relevant only to students, such as student ID, grade, etc. Now when a patron is moved from one group to another, a prompt will ask to keep old security settings, use the new ones, or both. Users cannot modify permissions for patrons with a higher security level. For example, a typical setup would have patrons at a level 50, and library staff at 90.



New

1. Click **Patron >Patron Group**.
2. Click New.
3. Enter the name and security level.
4. Select if the group is a Student, Staff or Other group. This will add a Student ID field in for the student groups and leave it out of the Staff and Other groups.
5. Select the Computer check box if you want this group to appear in the computer booking quick list as guests.
6. Select Default if this is the group you use for most of your patrons. As setting this default will cause that group to be selected by default when adding a new patron or importing. Unless a group field is included in import file.
7. Select Include in Report include patrons in statistical reports.
8. Select Warn Textbook Checkout by Schedule, if you want to be prompted when a patron tries to check out a textbook for a course they are not in. For this feature to work you need to have imported in a student's course schedule.
9. In the Nickname box please enter a group nickname. This is usually a shorter name that gets displayed when program is unable to display full group name.
10. Click Save.

Delete

1. Click **Patrons > Groups**.
2. Select the group you want to delete in the dropdown menu.
3. Confirm your deletion and click Delete.

Edit

1. Click **Patrons > Groups**.
2. In the dropdown select the group.

3. Click Edit.
4. Make any changes required.
5. Click Save.

Add Patron / Remove Selected Patron

1. Click **Patrons > Groups**.
2. In the dropdown select the group.
3. Click Edit.
4. Click "Add Patron" to open patron search to add a patron.
5. Search and select the patron name and click OK.
6. Click checkbox beside the patron name.
7. Click "Remove Selected Patron."
8. Click Save.

Archive

The Archive feature enables patron records to be deleted, stored in archive, and unarchived or deleted at a later date. This is helpful if a patron is inactive but the library does not want to lose their patron's information. Once patrons are removed from archive they are deleted permanently from the system and cannot be recovered. This feature is enabled by the administrator through **Administration > System Setting > Custom Setting > Archive Patron** set to a value of 1.

1. Click **Patron > Find/Add Patron**.
2. Select Archive as the search type.
3. Click Find.
4. Click Unarchive to restore patrons to the ILS.
5. Remove patrons back into the system by selecting the patron and clicking Delete.

Cleaning and Merging Patron Records

ILS offers the ability to clean up patron records, as well as merge duplicate patron records.

Clean Up Data

1. Click menu **Patrons > Clean Patron Data**.
2. Students in the left grid are from the district student information system.
3. Students in the right grid are in the Insignia database imported from the old library system.
4. If a student has a book checked their record will appear in red.
5. Compare the student lists. If a student on the right grid does not have a student ID, nor has an incorrect student ID, select the correct student from the left list and click Move Student ID.
6. If a student is no longer in school, select the student and the Archive checkbox.
7. If a student has the wrong ID, change it to the correct one.
8. Click Update to save the changes.
9. Click Status.
10. In the prompt, there will be two grids. The grid on the left will show all the students/users/staff that do not have student ID information.
11. The grid to the right will show all the students that have duplicate student ID info.
12. If the data is correct, then email Insignia Tech Support, and the duplicate records will be merged.

Merge Patron

1. Click menu **Patrons > Merge Patrons**.
2. Locate the patron records to be merged.
3. Click the checkbox of the patrons to be merged on the left grid.
4. Select a student form right list to be merged into.
5. Click Merge.

6. All the Circulation data from students selected from the left will be merged to the one on the right.

Local Patron Warning

Use the Search By criteria to find patrons. Select the patron's profile to see any warning notes associated with their record. Click "Edit" to add warning notes.

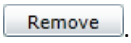
Patron Subsets

Patrons can be grouped into subsets to allow for changes to be applied to these subsets.

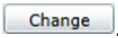
Subset

1. Click **Patron > Find/Add Patron**.
2. Find the patrons who meet the desired criteria using the search tools.
3. Select the patrons to be added to the subset (to select multiple patrons hold down Ctrl while clicking on selections).
4. To select all in the results list, click Subset all. To select only some of the patrons in the result list click subset.
5. Select the subset to which the student(s) should be added from the dropdown list. If the desired subset does not exist, a new subset may be created at any time by selecting the Create New radio button.

Clear and Change

1. Click **Patron > Find/Add Patron**.
2. Select subset in the search field from the dropdown list.
3. Select a subset from the last dropdown list.
4. To remove a patron from the subset, select the patron and click 

.
5. To clear the subset list, click

.
6. To apply changes to all patrons in the subset, click 

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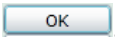
7. Specify the desired field type and the new value associated with the field type and click 

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Reports Module

Insignia Library System (ILS) has more than 150 predefined reports in the following categories plus the ability to produce fully customized reports:

1. Catalog
2. Circulation
3. Assets
4. Miscellaneous
5. Patron
6. Textbook
7. User Defined

Each report has a description, multiple limiting criteria, allowing staff to create reports based on the information they require. Reports can be searched by keyword. Selecting Show Export Options will provide the option to save to other programs, as well as e-mail the report in Preview. Clicking Image will provide a quick view of the report setup prior to generating it. Most reports can also be applied to a patron or item subset that has been previously created and saved.

Favorite Reports

Frequently used reports can be saved to a Favorites Tab for easy accessibility.

Add to Favorites

1. Go to the reports menu and choose a report.
2. Select report and click Add to Favorites.
3. View the report in the Favorites Tab.

Saving Report Criteria

The Insignia reports have a variety of settings and limiting fields that can be set when generating reports. The settings and limiting fields can be set up as a template when generating reports of the same nature in the future.

Save Criteria

1. Select a report type from reports menu.
2. Select limiting criteria.
3. Click Save Criteria.
4. Select Create New radio button.
5. Name the Report Criteria.
6. Click OK to save.

Delete Criteria

1. Click the drop down box arrow to the right of Save Criteria and Delete Criteria.
2. Select the criteria to delete.
3. Click Delete Criteria.

Apply Criteria

1. Go to the reports menu and choose a report type.
2. Select the report to be generated.
3. Click the drop down box arrow to the right of Save Criteria and delete Criteria.
4. Select the criteria to use.
5. Generate the report.

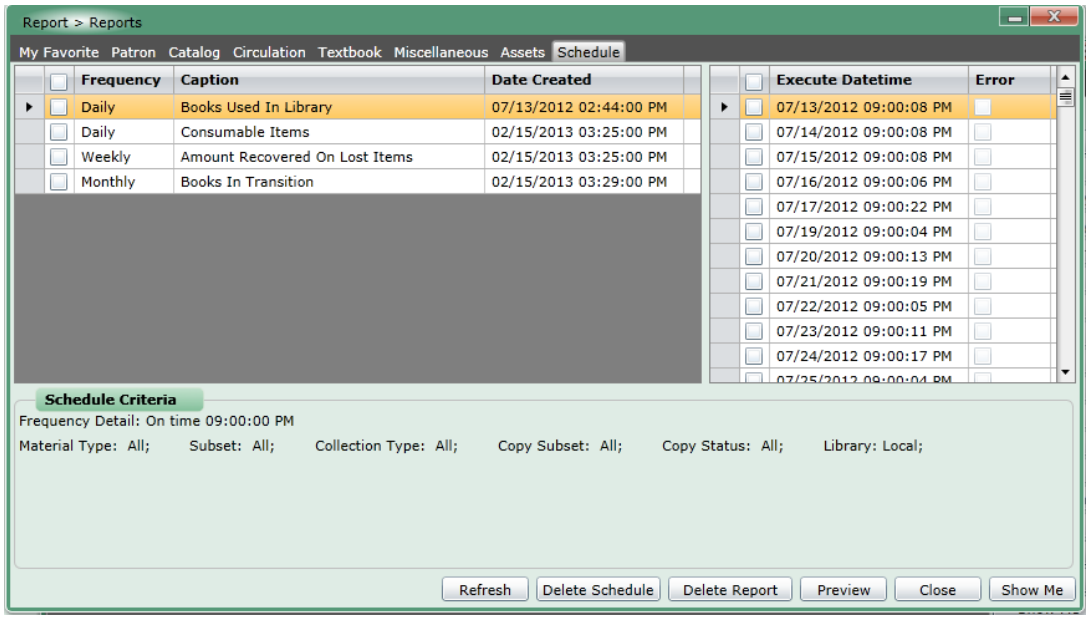
Description and Image buttons

Because reports draw upon data stored in a database, they may take some time to generate. In order to quickly check if the report is what is needed, there are two additional options in Insignia. One option is to view the description of the report. The description is accessed through clicking the Description button in the Reports window. Additionally, a snapshot of the report (produced from different data) can be viewed for the report by clicking on image.

Schedule

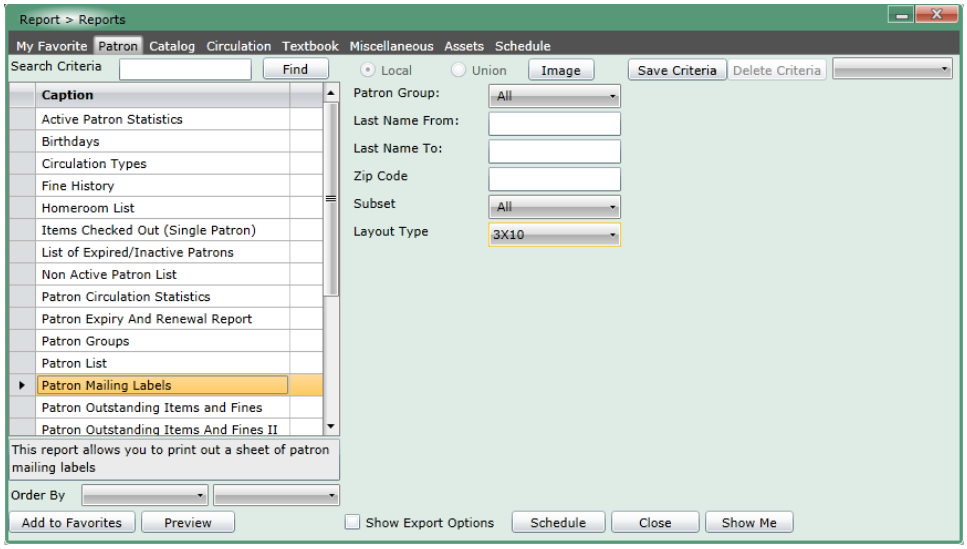
Reports can be set up to run at scheduled times.

1. From the Reports menu, choose a report type.
2. Select the report to schedule.
3. Click Schedule.
4. Select time and date in the window.
5. Click Save to finalize the process.
6. View the reports scheduled in the Schedule tab.



Patron Reports

Following reports are available under Patron section:

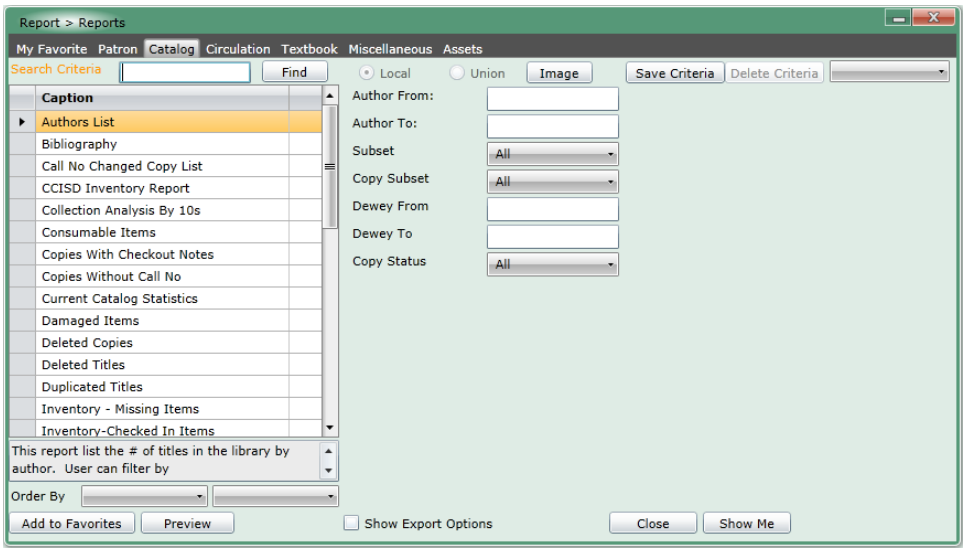


1. **Active Patron Statistics:** List of Circulation statistics for all active patrons
2. **Birthdays:** Lists patrons and their birthdays. Select a date range, homeroom, or subset to filter.
3. **Circulation Types:** Lists patron circulation types and their circulation restrictions as setup in **Administration > Circulation Types > Patron Circulation Types**.
4. **Fine History:** Lists fine details for patrons. Select a single patron, homeroom, patron group, status, or subset. Filter results further by defining activity date range and including lost items with overdue amounts, including items not checked in. This can be limited by the patron's total fine amount instead of a list of individual fines. This can be limited by the patron's total fine amount instead of a list of individual fines.
5. **Homeroom List:** Lists homerooms with teachers.
6. **Active Patron Statistics:** Lists all active patrons within the library and the total of each.
7. **Items checked out (single patron):** Lists title, call number, checkout date, due date, barcode number, and status of items checked out to a single patron. User may also choose to print overdue amounts only including items not checked in. This can be limited by the patron's total fine amount instead of a list of individual fines.
8. **List of Expired/Inactive Patrons:** Lists patrons who have expired or inactive memberships. Filter results by specific homeroom or by subset.
9. **Non Active Patron List:** Lists patrons without any circulation in a specific time frame.
10. **Patron Circulation Statistics:** Lists patron circulation statistics. User may limit the report by date range, times overdue, times renewed, checked out and subset. User may also group this report by: Homeroom, Patron Circulation Type and Patron Group
11. **Patron Expiry and Renewal Report:** List of patrons that are expired or have been renewed within a specific date range.
12. **Patron Groups:** Lists patron groups, level of permissions, and the number of patrons assigned.
13. **Patron List:** Patron list filterable by a specific patron group or subset.
14. **Patron Mailing Labels:** Prints standard mailing labels for sending notes to patrons. This report can be filtered by patron group, patron last name, postal/zip code, and subset. Mailing labels can be printed one specific patron or a list of patrons. This report now includes 3x10 and 3x11 labels.
15. **Patron Outstanding Items/Fine:** List of patrons with outstanding fines or overdues including items not checked in. This can be limited by the patron's total fine amount instead of a list of individual fines.
16. **Patron Statistics by Date:** List of patron's statistics by date.
17. **Patron Transaction Status:** Lists the transaction status for a specific patron when they moved to a different library. Lists Items Checked out, Overdue List, Lost Items, Damaged Items, and Fine History, Items on Reserve, Booked Items, and Checked out assets.

18. **Patrons with No Books checked out and no Deposit:** This report lists patrons who have books checked out with no deposit. User can limit by Group.
19. **Patrons with No Textbooks Checked Out**: This provides a list of patrons including their patron ID, homeroom and grade that have no textbooks checked out.
20. **Patrons with Fines:** lists patrons with fines by last name. Includes fine patron barcode and patron group. Prints separate sheets for each homeroom. User may limit the report by patron group, homeroom, fine amount, and subset.
21. Patrons with no Books checked out but no Refund Amount: lists patrons with no books out and no Refunds.
22. **Waived List:** This list shows the patron name, patron barcode, and waived amounts including amounts, dates, and notes.

Catalog Reports

The following reports are available under the Catalog section:

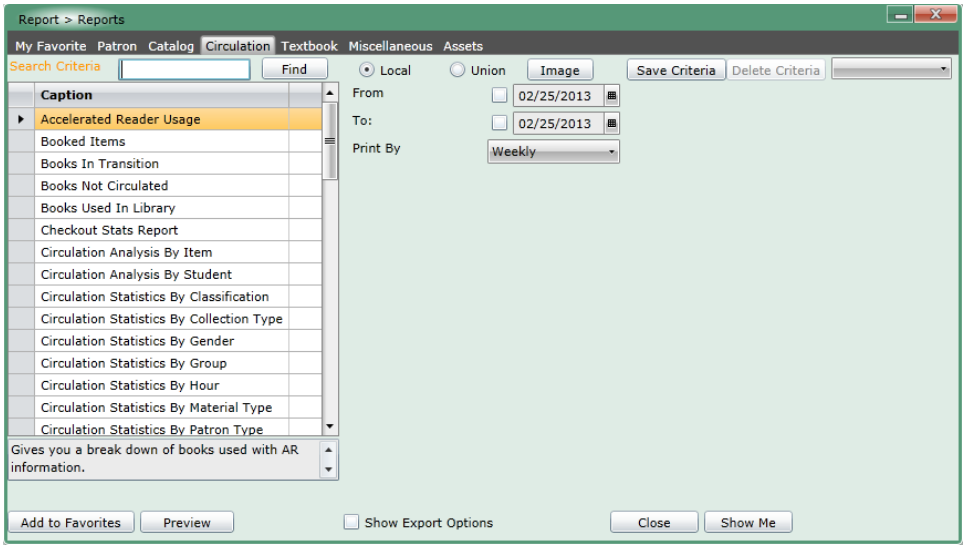


1. **Authors List**: Lists name of selected authorities.
2. **Bibliography:** Bibliography of selected items.
3. **Call No Changed Copy List:** This report shows the items call number and the most recent date that it changed.
4. **CCISD Inventory Report:** Lists copies by Dewey classification ranges, cassette tapes, CD-ROM, Total Copies, Total Titles, Accelerated Reader information, magazine subscriptions, lost and paid, and items checked out and not returned.
5. **Collection Analysis by 10s:** Lists your Dewey call number ranges in 10s.
6. **Consumable Items:** Lists all items that are labeled as consumable.
7. **Copies from Other Library:** Tracks copies in the local library that belong to another library from the system and can be searched by call number criteria.
8. **Copies Transferred to Other Library:** Tracks copies belonging to the local library that have been transferred to another library in the system and can be searched by Call Number criteria.
9. **Copies with Checkout Notes:** Lists all items that have checkout notes attached.
10. **Copies without Call Number**: Lists copies that have no call number.
11. **Current Catalog Statistics**: Lists circulation types and number of copies OR titles in circulation types.
12. **Damaged Items:** Lists books that have a damaged status.
13. **Deleted Copies:** Lists details about copies deleted including the date deleted and who it was deleted by which will indicate an admin account or user name.

14. **Deleted Titles:** Lists details about titles deleted including the date deleted and who it was deleted by which will indicate an admin account or user name.
15. **Duplicated Titles:** Lists duplicate book titles within the system.
16. **Inventory - Checked in Items:** Lists items which the inventory has determined as checked in. The Inventoried Item checkbox will generate a list of all items that are checked in. This report should be run at the end of inventory for a final list of all of the books checked in for all sections in the library.
17. **Inventory - Missing Items:** Lists items which the inventory has determined as missing. The Inventoried Item checkbox will generate a list of all items inventoried (not missing). This report should be run at the end of inventory for a final missing list of all sections in the library.
18. **Items Have Hold:** Tracks the title, call number, author and ISBN of books that have holds on them.
19. **Items to be weeded:** List of items marked to be weeded (marked as Weeded in **Catalog > Collection Analysis** in the Aged Titles tab).
20. **Items with Outstanding Fines Attached:** Lists items that have outstanding fines. It can be organized by status and it will show the dates of fines and the outstanding balance.
21. **Items without Call Number:** Lists items that have no call number.
22. **List of Copy Titles:** Lists copies in system including duplicates.
23. **List of ILL Titles:** Lists the titles in the Library that have been borrowed from other libraries as ILL items. It also lists who requested the items.
24. **List of Item Titles:** Lists titles within the system including duplicate titles. Additionally, this report identifies items cataloged through Z39.50. To limit the report further, select the option – Z39.50 Source Only, or Manually Created Only.
25. **Lost Items:** Lists items with a status of lost and the name of the patron who lost it. Additional limiting criteria include: Include Items Declared Lost and Include Textbook.
26. **Lost/Missing Items as Percentage:** Lists items missing by their location. The report shows the number of books in the location and books lost in that location. Additionally, the percentage of lost books in the location is displayed.
27. **New Mexico State Annual Report:** Lists the online databases, circulation counts, internet usage, traffic, serials, events, and ILL as well as relevant funding for these resources. This report includes copies in the collection by material type.
28. **Number of Titles by Material Type**: Lists the number of titles by material type.
29. **Publisher Summary**: Lists the number of books per publisher and total cost of items.
30. **Publishers**: Lists a detailed description of each publisher and contact information in system.
31. **Reading Program Detail:** Lists items and their reading program information
32. **Reading Program Summary by Reading Level:** Lists number of items and copies by reading level.
33. **Shelf List:** Lists library holdings in the shelf list order with bibliographic and holdings.
34. **Shelf List - Old:** Lists library holdings in the shelf list order with bibliographic and holdings and provides additional details such as subject headings, publishing details, and notes descriptions.
35. **Subject List:** Lists subject headings used in the library.
36. **Title List (With Copyright Date):** Lists titles in A-Z order with copyright date.
37. **Titles List (with notes)**: Lists titles in A-Z order with bibliographic information including notes.
38. **Titles List with reading program**: Lists titles in A-Z order with summary notes, subject, Reading Counts, Lexile Levels , AR Levels, and Fountas information.
39. **Title without Authority 1xx headings:** List of item titles without Authority 1xx headings.
40. **Titles without Copies:** Lists titles that have no attached copies.
41. **Value of Collection:** Lists the items within specified range and gives their collection value. This report can be limited by call number range, publication year, purchase date, material type, location and subset. This report requires that information entered in to the Copy Information Price field to be accurate.
42. **Value of Collection Detail:** Lists the items within specified range and gives their collection value. This report can be limited by call number range, publication year, purchase date, material type, location and subset. This report provides more detail on Copy Title, Barcode, and Price.

Circulation Reports

The following reports are available under the Circulation Tab:



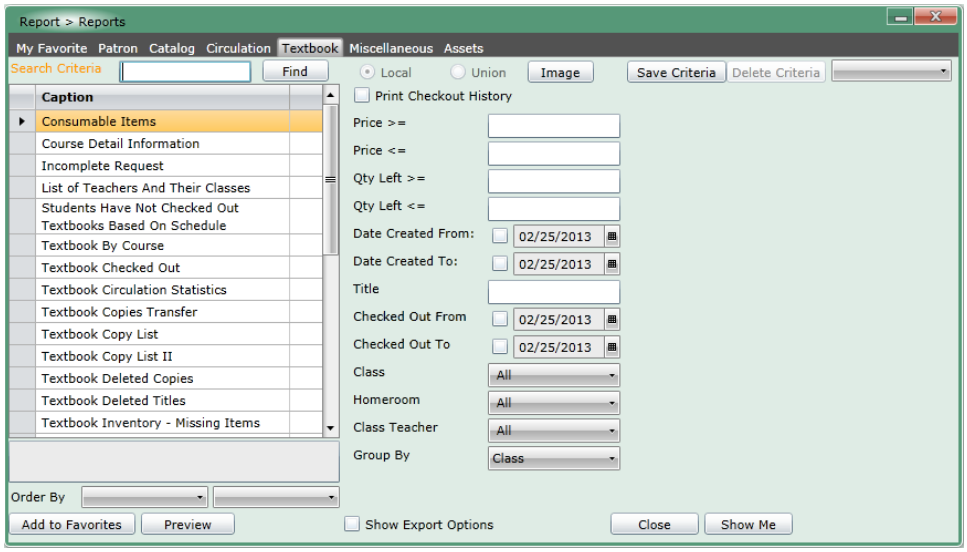
2. **Accelerated Reader Usage**: List of accelerated reader items usage from the library.
3. **Booked items:** Lists booked items.
4. **Books in Transition:** Lists books sent from home library logged in to another library.
5. **Books Not Circulated:** List of books that have not been circulated.
6. **Books Used in Library:** Lists books that have been counted as in house use. Whenever an item is checked in that has not been checked out, it is counted as in house use.
7. **Checkout Stats Report:** Lists the groups of patrons including the grade and the number of books checked out.
8. **Circulation Analysis by Day:** Lists the circulation statistics of items in the library, by the hour on the left-hand side and the weekday on the top.
9. **Circulation Analysis by Item:** Lists the circulation statistics of items in the library, such as the title cataloged, the copies added, checked out, lost, overdue, and in library use. This report also displays the amount spent.
10. **Circulation Analysis by Student:** Lists the circulation statistics of students by grade.
11. **Circulation Statistics by Classification:** A breakdown of circulation statistics by classification and call number (includes monthly and yearly).
12. **Circulation Statistics by Collection Type**: A breakdown of circulation statistics by collection type.
13. **Circulation Statistics by Gender:** A breakdown of circulation statistics by gender.
14. **Circulation Statistics by Group:** A breakdown of circulation statistics by group.
15. **Circulation Statistics by Hour:** A breakdown of circulation statistics by hour.
16. **Circulation Statistics by Material Type:** A breakdown of circulation statistics by Material Type, which include Check in, and Checkout values as well as the Totals.
17. **Circulation Statistics by Patron Type:** A breakdown of circulation statistics by Patron Type, which include Monthly and Yearly Circulation values as well as the Totals.
18. **Circulation Statistics by Vendor:** A breakdown of circulation statistics by Vendor, which include Checkout and renewal values by Vendor.
19. **Circulation Statistics by Zip Code:** A breakdown of circulation statistics by Zip Code, which include Checkout and renewal values by Zip Code.
20. **Circulation Statistics Report by Date:** A breakdown of circulation statistics by a Report Date range, which include Checkout, check in, and Hold values by a Report date.

21. **Circulation Status:** Lists fines, overdue items, and reserves for individual patrons. The report prints separate pages for each homeroom.
22. **Claimed Returns:** List of copies that have been claimed returned.
23. **Credit Deposit/Withdraw History:** Report shows Credit, Deposit, and Withdrawal information.
24. **Cross Tab Circulation Checkouts Report:** Lists different patron groups and the Collection types that they have checked out from for a total Checkout amount.
25. **Cross Tab Circulation Checkouts Report by Grade:** Lists different patron groups by grade and the Collection types that they have checked out from for a total Checkout amount.
26. **Cross Tab Circulation Report by Audience:** Lists the different audience groups and the Collection types that they have been checked out from to give user a total Checkout amount.
27. **District Circulation Statistics:** Lists the circulation statistics for all the libraries in the district.
28. **Fine Collected for Consumable Items:** Lists the fines collected for consumable items. It can be limited by when the fine was collected, which library it was collected from and includes comments on payments. There are options to include comments from the fines.
29. **Fine and Overdue Message:** This is a combination report of both the Fine and Overdue messages. There are various parameters to limit by and also options to include or exclude on the report. There are options to include comments from the fines.
30. **Fine Collected:** Lists the fines collected. It can be limited by when the fine was collected, which library it was collected from and includes comments on payments.
31. **Fine Message:** Prints messages to be sent to patrons regarding fines. There are options to include comments from the fines.
32. **Homeroom Status:** Lists number of checkouts by homeroom.
33. **Homerooms with most Circulation:** Lists the homerooms with the highest circulation.
34. **Item Circulation Statistics:** Lists circulation statistics for items.
35. **Items Checked In:** This report lists items checked in on a specific date range
36. **Items Checked Out (Historical):** Lists all circulating items with the name of the borrowing patron. The report prints separate pages for each homeroom.
37. **Items Checked Out to Other Libraries:** Lists all interlibrary loans lent to other libraries.
38. **Items Checked Out With Higher Reading Level**: Lists all titles checked out to patrons that contain higher reading level.
39. **Items on Loan/Overdue:** Lists items that are in circulation.
40. **Items on Reserve:** Lists items on reserve.
41. **Items Overdue:** Lists all items overdue including items not checked in. This can be limited by the patron's total fine amount instead of a list of individual fines. Lists the number of days overdue, who is the checkout by user, the checkout date, and the due date.
42. **Least Circulated Items:** Lists least circulated items.
43. **Library Statistics by Date:** Provides a snapshot of library activity in all modules for a given date range.
44. **List of Items Checked Out:** This creates a letter for patrons with all of the items checked out.
45. **List of Patrons with Overdue Books or Fines:** Lists patron name, barcode, grade, total fine, and total overdue including items not checked in. This can be limited by the patrons total fine amount instead of a list of individual fines.
46. **Money Collected by Other Libraries on my Behalf**: Lists the amount of fines, the date charged, and the fine type that is paid at one library on behalf of another library.
47. **Monthly Circulation Statistics**: Lists monthly circulation statistics. The report can be further limited by check in date range, subset, classification, material type and subject.
48. **Most Circulated Items:** Lists most circulated items.
49. **Other Libraries Items checked out at Our Library:** Lists items received from other libraries in the union.
50. **Outstanding Fine List:** This list shows the patron name, barcode, title, copy barcode, the fine type and the fine due.
51. **Overdue Message:** Creates a report listing overdue items for patrons, asking them to return their overdue books including items not checked in. This can be limited by the patron's total fine amount instead of a list of individual fines...

52. **Overdue/Checkout List:** Lists the patron name, status, due date, price, fine, checkout date, days over and replacement costs including items not checked in. This can be limited by the patron's total fine amount instead of a list of individual fines...
53. **Patrons Checked out Multiple Copies for Same Title:** Lists patrons who have multiple copies of the same title checked out.
54. **Patron Traffic:** This report lists the first name, last name, patron barcode, and the date when they checked into the library (date created).
55. **Reserve Message:** Generates messages to alert patrons when a reserve has come in.
56. **Students have not checked out Textbooks Based on Schedule:** List of patrons who have not checked out textbooks based on their schedule.
57. **Top Circulating Schools Statistics**: List of top circulating schools.
58. **Top Circulating Patron:** List of patrons who borrow from the library most often.
59. **Top Circulating Patron Types:** List of patron types who borrow from the library most often.
60. **Uncollected Reserve List:** Lists items on reserve that have not been picked up by patrons.
61. **Union Circulation Statistics**: This report lists the total items checked in, checked out, renewed, lost, reserved, booked, and how many AR materials were checked out.
62. **Union Loan Statistics:** Tracks loan statistics between libraries in a union.
63. **Union Loan Statistics by Title:** Lists titles borrowed from and lent to other union libraries.
64. **Year End Statistics:** Lists circulation activity for a year by month.

Textbook Reports

Following reports are available under Textbooks section:

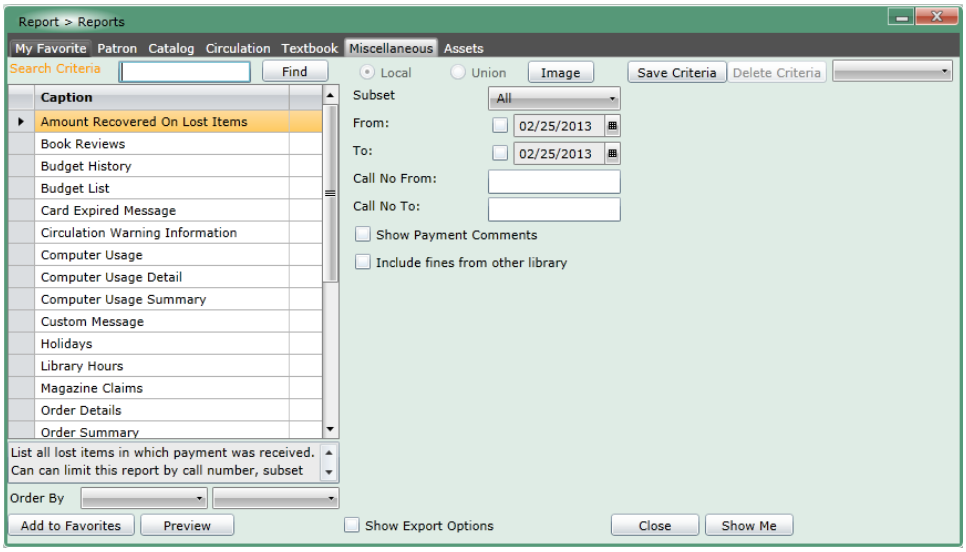


1. **Consumable Items:** Lists the consumable items, price, consumed, available, total, remaining price, and total price.
2. **Copies from Other Library:** Tracks textbook copies in the local library that belong to another library from the system and can be searched by call number criteria.
3. **Copies Transferred to Other Library:** Tracks textbook copies belonging to the local library that have been transferred to another library in the system and can be searched by Call Number criteria.
4. **Course Detail Information:** List of your courses and the patrons in them
5. **Incomplete Request:** Shows the status on textbooks that have requests sent and may have been partially shipped to another library without fully completing the request. It breaks down the request by items and lists a number of copies.

6. **Incomplete Site Request:** Shows the status on textbooks that have requests sent but have not been shipped yet. It breaks down the request by items and lists a number of copies.
7. **List of Teachers and their Classes:** A list of teachers, their classes, the periods of those classes, and the number of students in this class.
8. **List of Transfer Not Received Yet:** This lists copies that have been transferred but not received by the other library yet and shows the copy barcode and status.
9. **Students Have Not Checked out Textbooks Based on Schedule:** This lists students and their specific classes who have not yet taken out any textbooks.
10. **Textbook by Course**: Lists all textbooks by the course they are linked to. The report includes the ISBN, Title and number of copies for each textbook. User can limit by the title of the textbook.
11. **Textbook checked out**: Lists all the textbooks checked out. User may limit this report by individual patron, homeroom, grade, and course.
12. **Textbook Circulation Statistics:** Lists circulation statistics for textbooks. User may limit the report by date range.
13. **Textbook Copies Transfer:** Lists all the transfers of the textbooks in library.
14. **Textbook Copy List**: Lists the copy title, barcode, location, status and copy no or copy number.
15. **Textbook Copy List II**: Lists the title, ISBN, price, edition, total copies, and the list of patrons who have checked out each copy.
16. **Textbook Deleted Copies:** Lists the copy call no, title, author, barcode, price, date deleted, and deleted by username.
17. **Textbook Deleted Titles:** Lists the item call no, title, author, date published, date deleted, and deleted by username.
18. **Textbook Inventory - Checked In Items:** Generates a list of the textbook copies marked as checked in.
19. **Textbook Inventory - Missing Items:** Generates a list of the textbook copies marked as missing.
20. **Course Detail Information:** Lists course information, textbooks used, teacher, and students enrolled in the course.
21. **Textbook Inventory Status:** Displays current textbook inventory status.
22. **Textbook Library Statistics:** List of all textbook library statistics.
23. **Textbook Lost/Damage Statistics:** Lists Textbooks that are damaged or marked as lost.
24. **Textbooks Overdue List**: Lists all overdue textbooks. This report can be limited to homeroom, grade, teacher, group, title, and From List
25. **Textbook Overdue Message:** Lists overdue textbooks. This report can be limited by patron group and by date. Individual patrons may be selected by using the from list option and entering or scanning in the patron barcodes.
26. **Textbook shortage Student List:** Report listing patrons that have not received a textbook yet for a current course.
27. **Textbook Statistics:** A list of Textbook titles and Circulation and Catalog statistics
28. **Textbook Status Summary:** Lists all textbooks in the system and their status.
29. **Textbook Titles:** Lists all textbooks in the system.
30. **Textbook Title/Kits List:** Lists title, edition, publisher, ISBN, author, replacement price, copies, and available.
31. **Textbook Transfer list:** Lists textbook transfers that happened and the books involved in those transfers. The prefix can be changed to represent the school to which the book is being transferred.
32. **Textbook Year End Statistics:** Lists textbook circulation activity for a year, broken down by month. This report can be limited by date range.
33. **Transfer Slip:** Lists title, ISBN, Quantity Requested or Qty Requested, Quantity Shipped or Qty Shipped, Price, and Total.
34. **Value of Collection:** Lists the items within a given range and provides the material type value.
35. **Value of Collection Detail:** Lists the items within a given range and provides the material type value. This report provides more details on copy titles, barcodes, and price.
36. **Request/Transfer:** Lists title, total requested, total transfer, and value transfer.

Miscellaneous Reports

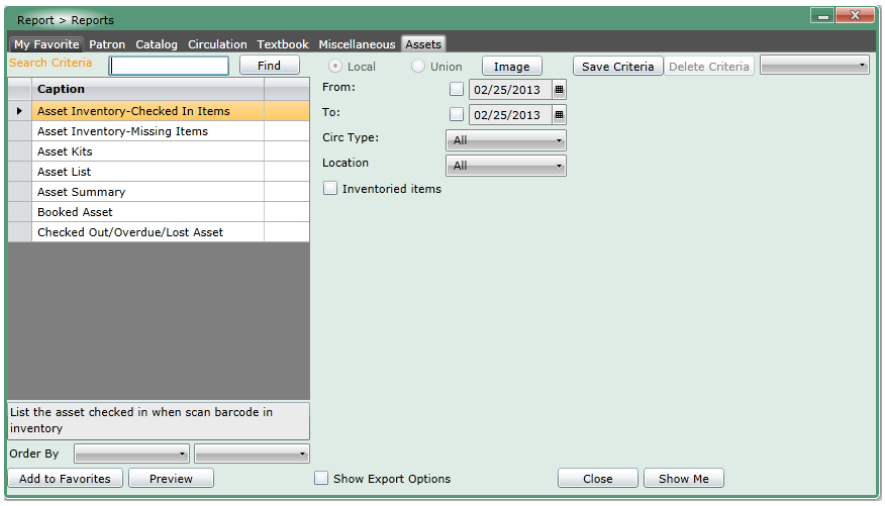
The following reports are available under miscellaneous section:



1. **Amount Recovered on Lost Items:** Lists amounts charged, paid, and waived for lost items.
2. **Book Reviews:** Lists titles, review, date added, and approved.
3. **Card Expired Message:** Prints notices to send to patrons with expired memberships.
4. **Circulation Warning Information:** Prints warnings attached to patron records.
5. **Computer Usage:** Lists computer usage by computer and by time frame.
6. **Computer Usage Detail:** Lists computer usage in further detail.
7. **Computer Usage Summary:** Gives a summary of computer usage.
8. **Custom Message:** Prints custom messages for patrons. The report can be further limited by message type, patron group, homeroom, and subset. Further, the report can narrow down results by checking the box, Show Inactive Patrons, and From List and scan the barcodes to be included on the list i.e. Reserve Book report with item barcodes.
9. **Holidays:** Displays the holiday schedule as listed in Library Info. This report can be further limited by date range.
10. **Library Hours:** Lists library hours as specified in Library Info.
11. **Override History:** Displays a history of when the override password has been used.
12. **Printer Usage Detail:** Displays details of printer usage.
13. **Printer Usage Summary:** Displays a summary of printer usage.
14. **Search Statistics:** Displays a pie chart graph of successful and unsuccessful searches by search type.
15. **Search Statistics 2:** Provides a text report of successful and unsuccessful searches by search term and count.
16. **Subscription Costs:** Displays the amount spent on serials subscriptions.
17. **Summer Reading program:** Lists all summer reading programs.
18. **System Message:** Displays system message (for printing purposes).
19. **Union Libraries**: Provides basic information on the libraries that form the Union.

Assets Reports

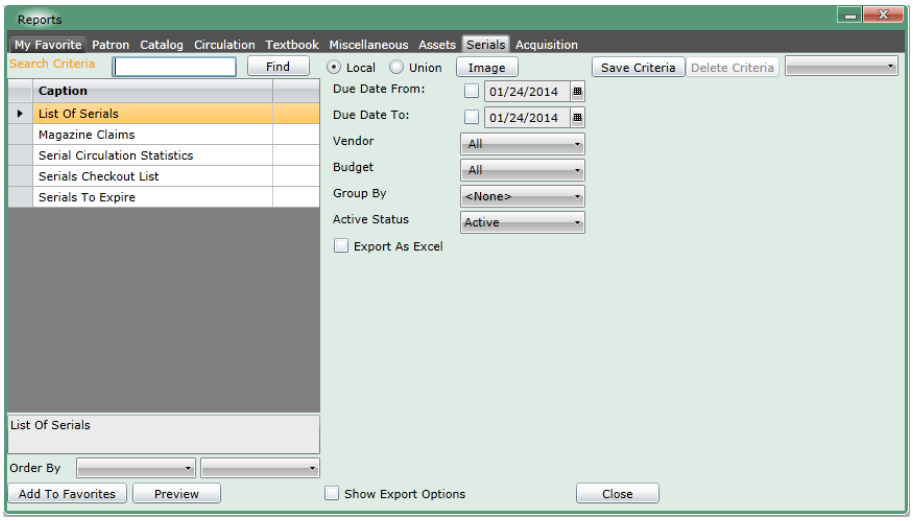
The following reports are available under the Assets Tab:



1. **Asset Inventory - Checked in Items:** Lists the asset checked in when scan barcode in inventory.
2. **Asset Inventory - Missing Items:** Lists the assets missing after the inventory has finished running.
3. **Asset Kits:** Lists all the kits available in the system.
4. **Asset List:** Lists all the assets in system.
5. **Booked Assets:** Lists all assets booked.
6. **Checked out/Overdue/Lost Assets:** Lists all assets checked out, with items overdue including items not checked in. This can be limited by the patron's total fine amount instead of a list of individual fines. This report can be further limited by individual patron, booking dates, material type, and location.

Serials Reports

The following reports are available under the Serials Tab:

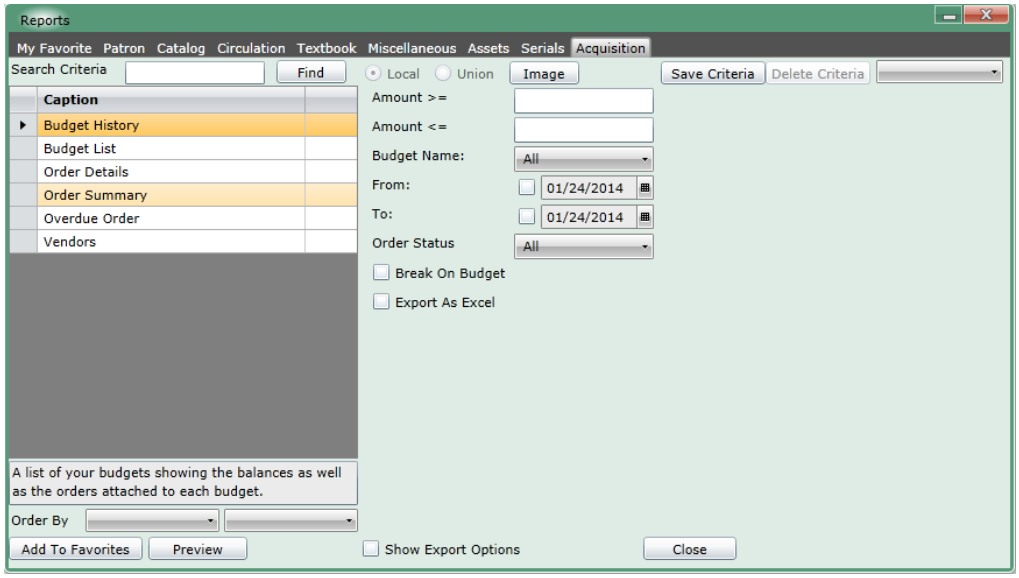


1. **List of Serials:** This report will show the title, the first issue volume, the last issue volume, the date when the first issue came in and the date the last issue came in as well as the price.
2. **Magazine Claims:** Shows serials that have been claimed. User can limit by vendor, date range, or customized message.
3. **Serial Circulation Statistics:** This report shows serial circulation totals by month.
4. **Serials Checkout List:** The serials checkout list shows the title, the issue's price, the barcode, the volume number, the issue number, the patron barcode, the patron name, the checkout date, and the due date.

5. **Serials to Expire:** This will show the title, the issue's price, the expiry date, the budget, and the vendor.

Acquisitions Reports

The following reports are available under the Acquisitions Tab:



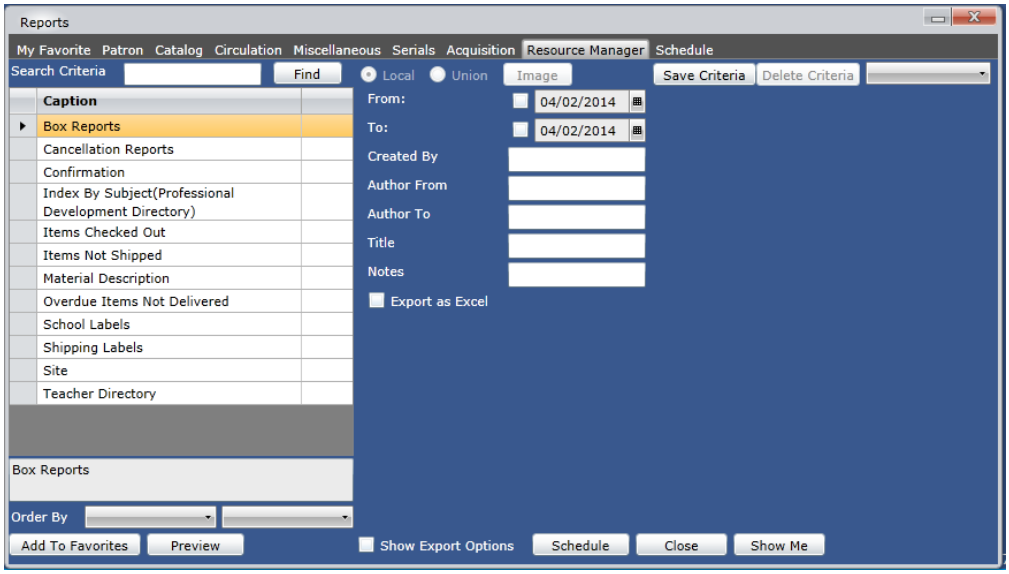
1. **Budget History:** Lists budgets and provides a transaction summary for each order. This report can be further limited by budget dollar value range.
2. **Budget List:** Lists budgets with value summaries.
3. **Order Details:** Provides details on orders in process. This report can be further limited by date range, vendor, order status, dollar value range, budget name and who it was created by.
4. **Order Summary:** Provides a summary on orders. This report can be further limited by date range, order status, budget name, vendor name, created by and budget amount range.
5. **Overdue Order:** Displays orders that are past due including items not checked in. This can be limited by the patron's total fine amount instead of a list of individual fines.
6. **Vendors:** Provides basic information on vendors that supply assets. The report can be further limited by vendor name range.

Resource Manager

The following reports are available under the Resource Manager Tab:

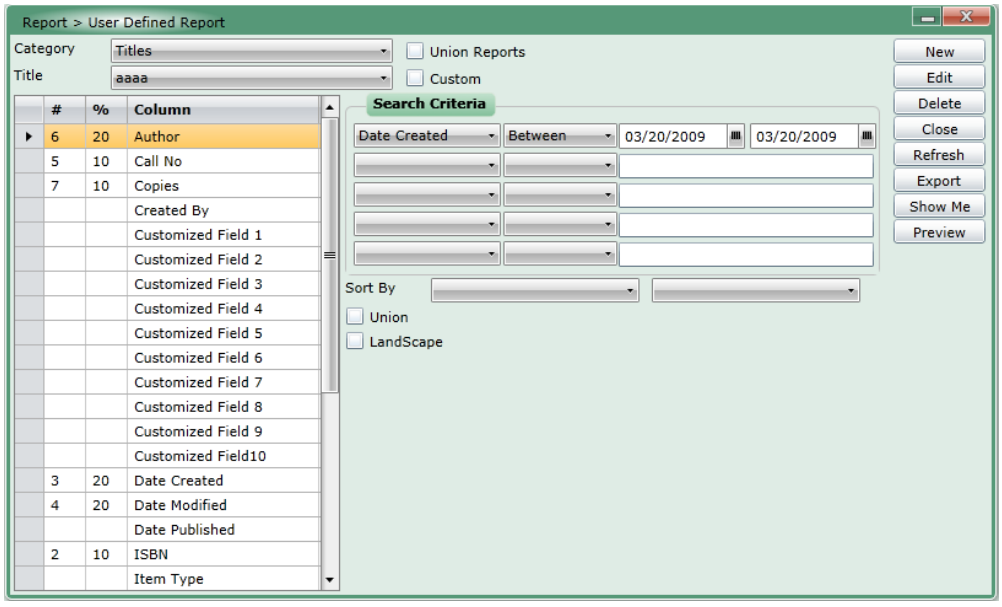
1. **Box Reports:** This report includes the box name, which user created the box, when it was created, and notes on the box.
2. **Cancellation Reports:** All of the cancelled requests are listed in this report.
3. **Confirmation:** This report lists items requested by patrons including the catalogue number, title, delivery, and due date.
4. **Index By Subject (Professional Development Directory):** The index lists the subject, title, catalogue number and grade level.
5. **Items Checked Out:** Columns include title, catalogue number, check out date, due date, barcode, and library id for checked out items.
6. **Items Not Shipped:** See the call number, status, due date, who the item is checked out to, the phone number, site name, who the items will be checked out to, their phone number, and site name for all items not shipped yet.

7. **Material Description**: All of the new items enclosed in a box can include information such as the title, reading level, subject, audience, description, and call number.
8. **Overdue Items Not Delivered:** This report can include the site name, call number, title, copy barcode, due date, who is returning it past the due date, and who will receive the overdue item at the next school.
9. **School Labels**: The school labels include the address, school name, and contact person for labels to be printed.
10. **Shipping Labels**: Barcode, Call Number, Title, Check Out Date, Due Date, and Patron Name listed with the Site Name will show on the shipping labels in this report.
11. **Site**: This lists all sites that integrate into the resource manager.
12. **Teacher Directory**: The teachers' information listed with a site selected for the resource manager will list in this report.



User Defined Reports

Insignia Library System enables reports to be designed.



1. Click **Reports > User Defined**.
2. Select a category of report
3. Copies - provide information relating to holdings.
4. Patrons - provide information relating to library users.
5. Titles - provide information relating to bibliographic item records.
6. Asset - provides information relating to Assets.
7. Kits - provides information relating to Kits that have been created in the Assets module.
8. Circulation - provides information on circulation statistics and information.
9. Textbook Copy - provides information on textbooks in the system.
10. To work with a report created previously, choose the category and title from the dropdown lists.
11. To create a new report, click New.
12. Select the report columns to use by clicking in the corresponding box beside the fields and placing a number in them. For example, to create a report with Title, Author, and Call Number listed, a number 1 must be in the box beside Title to list in in the first column.
13. To select the size of the columns relative to the page enter a percentage beside the column name corresponding to the amount of space the column will take up on the page.
14. Set the search fields from the dropdown menus and enter criteria.
15. Input a title for the report.
16. To print in landscape format, check Landscape.
17. To save this layout for future use, click Save.
18. Print the report by clicking Preview and then on the printer icon.

Administration Module

Administration Module includes tasks such as maintaining security, library setup, inventory and global changes, Z39.50 setup and other system settings. When logged in as library administrator, i.e. admin####, only local library information can be modified. When logged in as admin, changes can be made using Custom Setting, allowing staff to configure parameters that are system based. Administration Module contains the following content:

1. Library Setting
    a. Circulation Types
    b. Configuration
    c. Library Info
    d. System Message
    e. Find / Add Summer Reading Program
    f. Events
    g. Merge Parameters
    h. ILL Library Info
    i. NCIP Library Self Info
    j. NCIP Agency Setting
    k. Home Page
    l. Map Editor
2. Z39.50 Hosts
3. Security
4. Global Changes
    a. System Defined Changes
    b. User Defined Changes
    c. MARC Item Type Changes
5. System Setting
    a. MARC Cleanup
    b. Notification
    c. Parameters
    d. Customize captions
    e. Online Databases
    f. Records Locked
    g. Invalid Suggestions
    h. Login History
6. Import/Export
    a. Import
    b. Export
7. Inventory
8. Kiosk Categories
9. Instant Message
10. Quick Toolbar
11. NCIP 1.0
    a. NCIP Service
    b. NCIP Message
12. SIF Log

Circulation Types

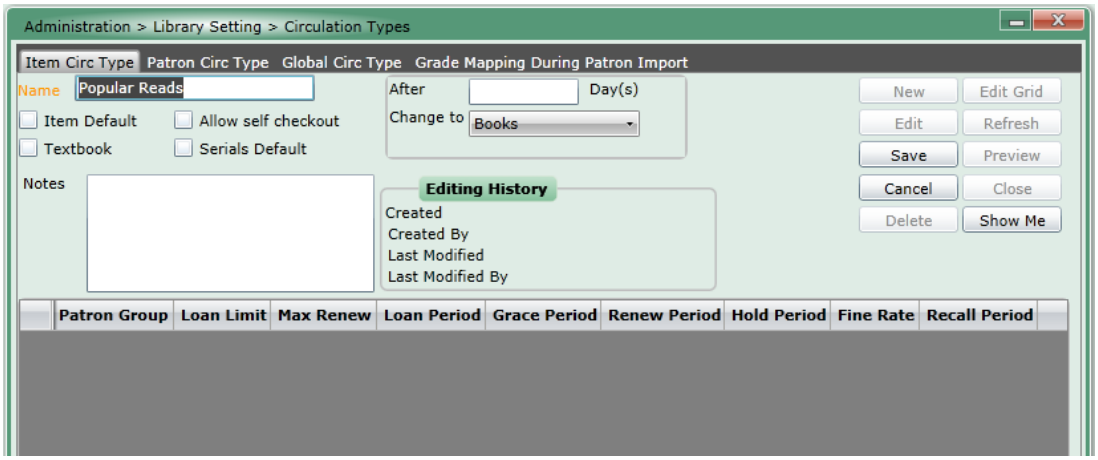
Insignia Library System (ILS) allows staff to customize all aspects of circulation. Each library has different needs, unique patron groups and specific circulation requirements. ILS offers a flexible environment, capable of circulating any collection in a way tailored to each library requirement.

Item Circulation Types

Item types are created to identify the type of loan, for example patrons can be permitted to borrow DVDs for 3 days while books can be borrowed for 3 weeks. By creating unique item types circulation can be defined different types of parameters. Common types are books, video, magazine, CD/DVD. The types created are left to library staff. The basic rule is to create multiple item types only if the loaning privileges are different.

New

1. Click **Administration > Library Setting > Circulation Types**.
2. Click New.
3. Type the name of the Item Circulation Type.
4. To set this type as the default to be used when adding New items, select the checkbox Item Default.
5. To set this type as the default to be used when adding New serials, select the checkbox Serials Default.
6. To set this type as the default for textbooks, select the checkbox Textbook.
7. To switch to another type after so many days, specify the number of days and the type change to. For example, this is done with New Books being transferred to Book status.
8. Click Save.
9. Repeat step 2-8 for as many types as needed.



Delete

1. Click Administration > Library Setting > Circulation Types.
2. Select an item circulation type from the list you would like to delete.
3. Click Delete.
4. Confirm the deletion.

Edit

1. Click Administration > Library Setting > Circulation Types.
2. Select an item circulation type from the list you would like to Edit.
3. Click Edit.
4. Make any changes needed.
5. Click Save.

Item Circulation Type Terms: Edit Grid

Loan Limit

This is the maximum number of items of this type that a patron can check out at a given time. This number cannot exceed the overall loan limit set in Patron Circulation Type.

Max Renew

This is the number of times an item of this type can be renewed.

Loan Period

This is the number of days, hours, weeks, months or semesters an item belonging to this type can be checked out for

Grace Period

This is the grace period allowed for patrons for overdue items when calculating fines. To remove the graces period set this value to 0.

Renew Period

This is the number of days, hours, weeks, months or semesters patrons can have particular items renewed.

Fine Rate

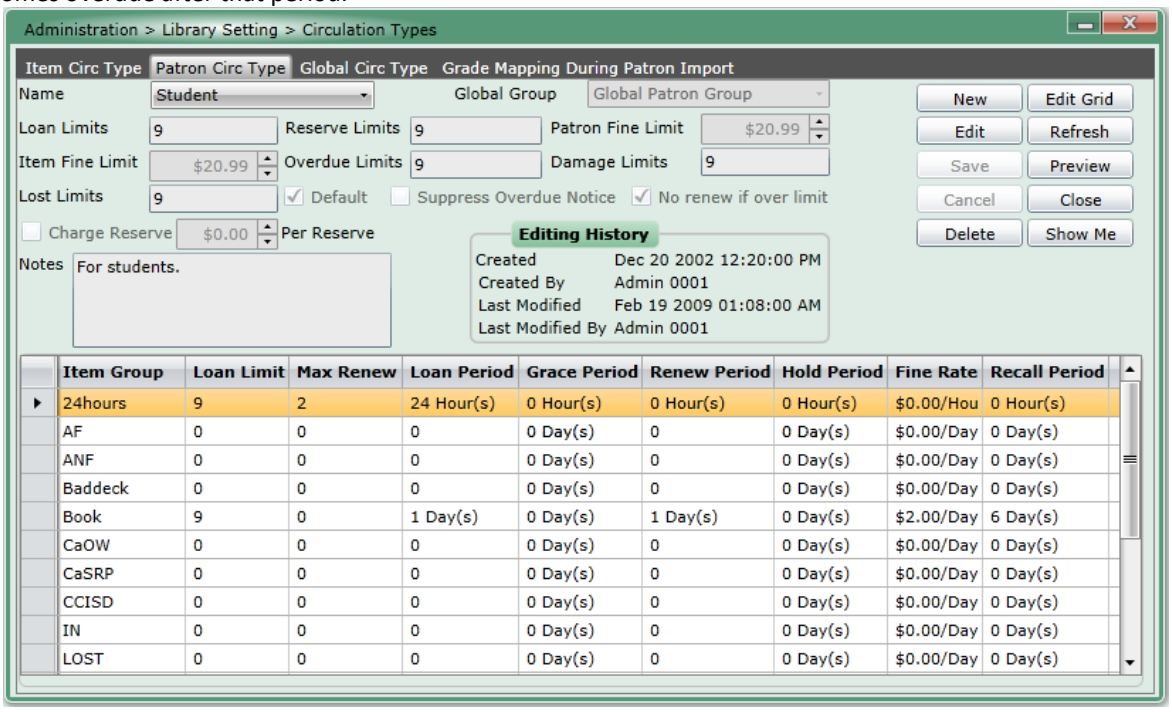
The fine rate is the rate at which overdue fines are calculated for the item type.

Hold Period

This value represents the number of days the item type will stay on reserve for.

Recall Period

This value represents the number of days set for a recall. If the item is not returned by the recall period; it becomes overdue after that period.



Patron Circulation Type

Multiple patron Circulation types only need to be created if there are different loan parameters for different types of patrons.

New

1. Click **Administration > Library Setting > Circulation Types**.
2. Click Patron Circulation Type tab.
3. Click New.
4. Enter the New patron type.
5. Enter the Global Group; if this local patron circulation type is linked to a Global Circulation Type (see Set Up under Global Circulation Types).
6. Select default checkbox to use the current data as the default setting in a new patron circulation type.
7. Specify all the parameters for this patron type.
8. Click Save.
9. Double-click an item in the grid below. The Loan Trap window will appear.
10. Specify the parameter values.
11. Click Save.
12. Repeat step 7-9 for item types in the grid below.

Delete

1. Click **Administration > Library Setting > Circulation Types**.
2. Click the Patron Circulation Type tab.
3. Select a Patron circulation type from the list to delete.
4. Click Delete.
5. Confirm the deletion.

Edit

1. **Click Administration > Library Setting > Circulation Types**.
2. Click Patron Circulation Type tab.
3. Select a Patron circulation type from the list you would like to edit.
4. Click Edit.
5. Make any changes needed.
6. Click Save.

Patron Circulation Type Terms: Edit Grid

Loan Limit

This is the maximum number of items the patron type can check out.

Item Fine Limit

This is the maximum fine the patron type can have for this item type.

Lost Limit

This is the maximum number of items a patron type can lose (without paying) before borrowing privileges are denied.

Reserve Limit

This is the maximum number of reserves the patron type may place.

Overdue Limit
This is the maximum number of overdue items the patron may have before borrowing privileges are denied.

Patron Fine Limit
This is the maximum fine the patron type may incur before borrowing privileges are denied.

Damage Limits
This is the maximum number of damaged items the patron type may have before borrowing privileges are cancelled.

Global Circulation Types

Global groups specify parameters used for Inter-branch lending. Every patron circulation type has a global type for the system to apply the appropriate circulation parameters during Inter-branch lending. Login as the district administrator to create global circulation types. Enable global circulation types with the item type as system based, not site based. Click **Administration > Custom Setting** and set the value custom parameter District Based to 1.

New

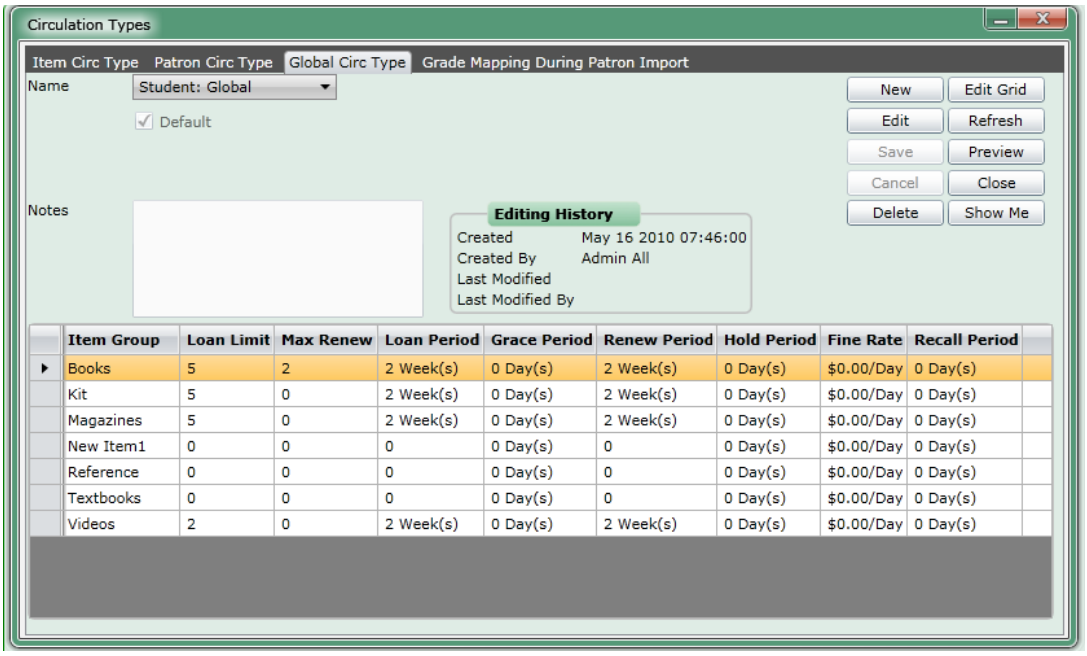
1. In the **Admin All** Profile, click **Administration > Library Setting > Circulation Types**.
2. Click Global Circulation Types tab.
3. Click New.
4. Enter the name of the global type.
5. Check the Default checkbox for this global type to be the default.
6. Click Save.
7. Double click any items that will become globally circulated in the grid, if necessary.
8. Specify all the parameters values.
9. Click Save.

Edit

1. Click **Administration > Library Setting > Circulation Types**.
2. Click Global Circulation Type tab.
3. Select a Global circulation type from the list you would like to edit.
4. Click Edit.
5. Make any changes needed.
6. Click Save.

Delete

1. Click **Administration > Library Setting > Circulation Types**.
2. Click the Global Circulation Type tab.
3. Select a Global circulation type from the list to delete.
4. Click Delete.
5. Confirm the deletion.



Set Up

1. In the Admin or AdminXXXX profile, click **Administration > Library Setting > Circulation Types**.

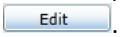
Note: If the circulation types are set up at a district-level, the loan period specified in the Global Circulation Types grid will determine the loan length of the items associated with this patron type.

2. Click the Patron Circulation Types tab.
3. Select the type from the "Name" dropdown menu.
4. Click "Edit" and select the type from the "Global Group" dropdown.
5. If necessary, specify the loan period for the item type in the grid, if circulation types are set up at the local library level and not the district level.

Grade Mapping during Patron Import

Grade mapping assigns patron circulation types to certain grades for circulation purposes. This feature is very powerful for K-12 libraries where data is imported from their student information system and the school has different loan period for different grades. Once this features is enabled, the system will automatically change the circulation type based on the grade the student is enrolled.

Edit

1. Go to **Administration > Library Setting > Circulation Types.**
2. Click Grade Mapping tab.
3. Click 

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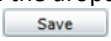
4. From the dropdown lists choose the patron Circulation type to assign to each grade.
5. Click 

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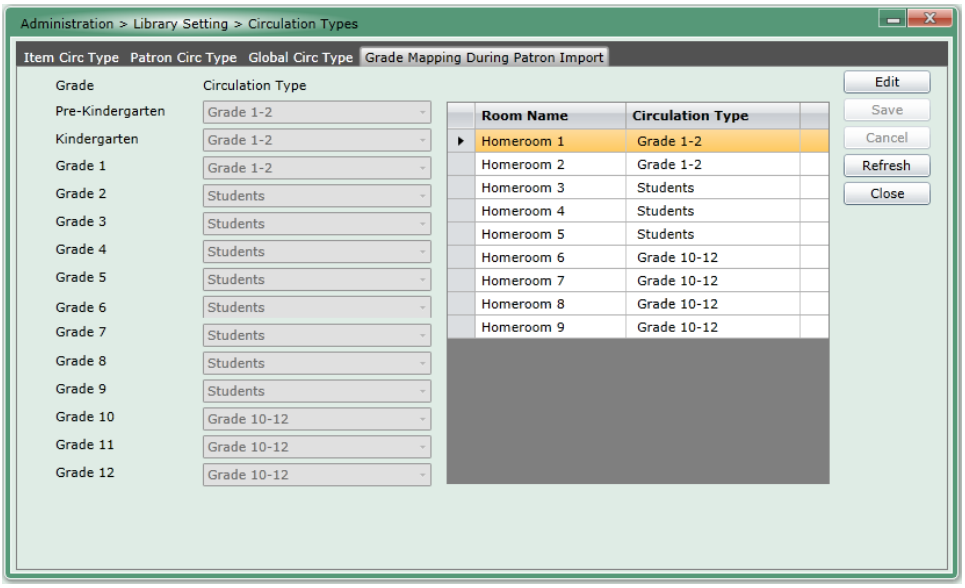


Homeroom Mapping

Homeroom mapping assigns certain patron circulation types to certain homerooms for circulation purposes. This feature is very powerful for K-12 libraries where data is imported from student information system and the school applies a loan period to different Homerooms. Once this feature is enabled, the system will automatically change the circulation type based on the homeroom the student is enrolled in.

1. Go to **Administration > Library Setting > Circulation Types**.
2. Select the Grade Mapping tab.
3. Click Edit.
4. From the dropdown lists, choose the patron Circulation type to assign to each homeroom.
5. Click Save.

Configuration

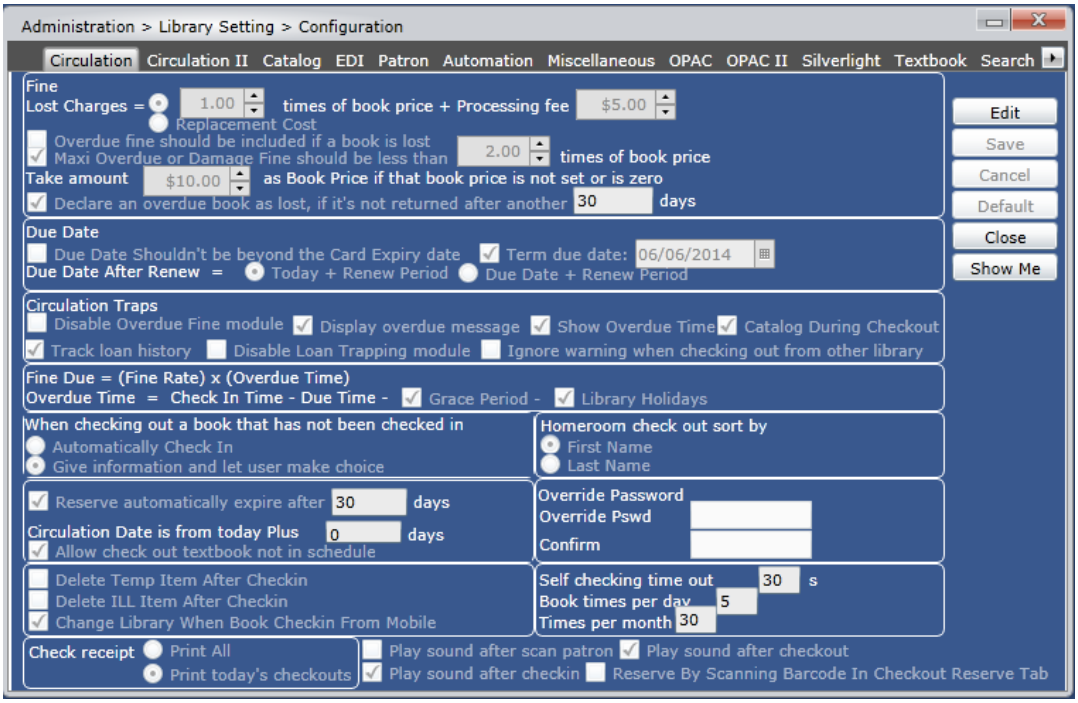
Insignia Library System is pre-configured so that it can be used right away. Common groups, permissions, and defaults are predefined. Library staff can add new groups, assign permissions to the groups, and change default parameters. However, staff cannot add new permissions or change the security setting for the Administrator user.

Click Administration > Library Setting > Configuration.

Configuration: Circulation Tab I

Users can set different circulation parameters from this interface. Parameters in Circulation 1 Tab Configuration:

1. Fines
2. Due dates
3. Circulation Traps
4. Reserves
5. Checkout
6. Check In
7. Reserves
8. Computer Booking



Fine Lost Charges

<u># times of book price + Processing fee</u>

This setting determines what amount a patron pays for a lost item. They can pay a fraction of the cost of the book or the entire replacement cost. A Processing fee is also added here.

<u>Overdue fine should be included if a book is lost</u>

If this checkbox is selected the overdue fines accrued on a lost item will be included in the patrons charges for that item.

Maximum Overdue or Damage Fine should be less than
This setting is used to specify the maximum overdue fine as a function of the price.

Take Amount as Book Price if that book price is not set or is zero
This field sets a price for copies when one is not recorded in the record. If there is not a price given for the item then it is set to the value set to the one in this field.

Declare an overdue book as lost, if it's not returned
Fill the following field "after another XX days" with how many days a book is overdue for the status to change as lost.

Due Date

Due Date shouldn't be beyond the Card Expiry date
If this checkbox is selected the due date for any item will not be beyond the date their card expires.

Term Due Date
Set this value so that item loan periods cannot extend beyond it.

Due Date + Renew Period
Renewal date is either from today plus the renewal period or from the due date plus the renewal date.

Circulation Traps

Disable Overdue Fine module
If this option is selected the overdue fines are disabled.

Display Overdue Message
If this option is selected, the overdue message will appear when checking in the book.

Show Overdue Time
If selected provides an hourly time for overdue returns.

Catalog during checkout
Selecting this checkbox allows a record to be cataloged at checkout if the item is not found when scanned.

Track loan history
When checked system will keep track of all items checked out by all patrons.

Disable Loan trapping module
If this checkbox is selected the system will disable all loan trapping.

Ignore warning when checking out from other library
Remove the warning that says the home libraries of the patron and item are not the same.

Fine Due = (Fine Rate) x (Overdue Time)

The overdue time = Checkin time – Due time – Grace period – Holidays
Staff can determine if the system should charge fine for holidays and grace period.

When checking out a book that has not been checked in

Automatically Check in
When this radio button is selected, then system will give a popup message to confirm to check in for the last user.

Give information and let user make choice
When this radio button is selected, when a book is being checked out when it has not been checked in first the system will check it in for the first user and then check it out.

Homeroom check out sort by

First Name
Choose the radio button to sort name type alphabetically.

Last Name
Choose the radio button to sort name type alphabetically.

Reserve automatically expire after
If this checkbox is selected the item on reserve will only stay on reserve for a maximum amount of days. If the item is not available for the patron within that time the reserve will expire. To set the amount of days an item can be on reserve for enter it in the field.

Circulation Date is from today plus
Enter the amount of days before a newly cataloged item can be circulated.

Allow check out textbook not in schedule
Allow textbooks not in a patron's class schedule to become checked out.

Override Password

Override Pswd
Type the new override password.

Override Password
Retype the password to confirm it.

Delete Temp Item After Check in
If this checkbox is selected temporary items will be deleted upon check in.

Delete ILL Item After Check in
If this checkbox is selected ILL items will be deleted upon check in.

Change Library When Book Check in From Mobile
If checked, the library will be changed to the library that originally loaned the item.

Self-Checking Time Out
Enter the amount of time in this field that a self-checkout machine will maintain information before timing out.

Book Times Per Day #
How many booking slots are available per day.

Times Per Month
How many times a patron can create a booking per month.

Check Receipt

Print All
This radio button will display all receipts.

Print today's checkouts
This radio button will display today's receipts only.

Play sound after check in
Have a sound go off when checking in an item.

Play sound after check out
Have a sound go off when checking out an item.

Reserve By Scanning Barcode In Checkout Reserve Tab
When selecting the reserve tab, the barcode scanned in Copy Barcode will become a line in the grid of the Reserves tab and put a reserve on the copy rather than scan the copy to Check Out into the Items on Loan tab.

Configuration: Circulation Tab II

Circulation Setting

Reset Patron Barcode during Checkout
Allows a new patron barcode to be assigned at checkout.

Show Kit Detail
When enabled, the details of a kit being checked out will show in the checkout window.

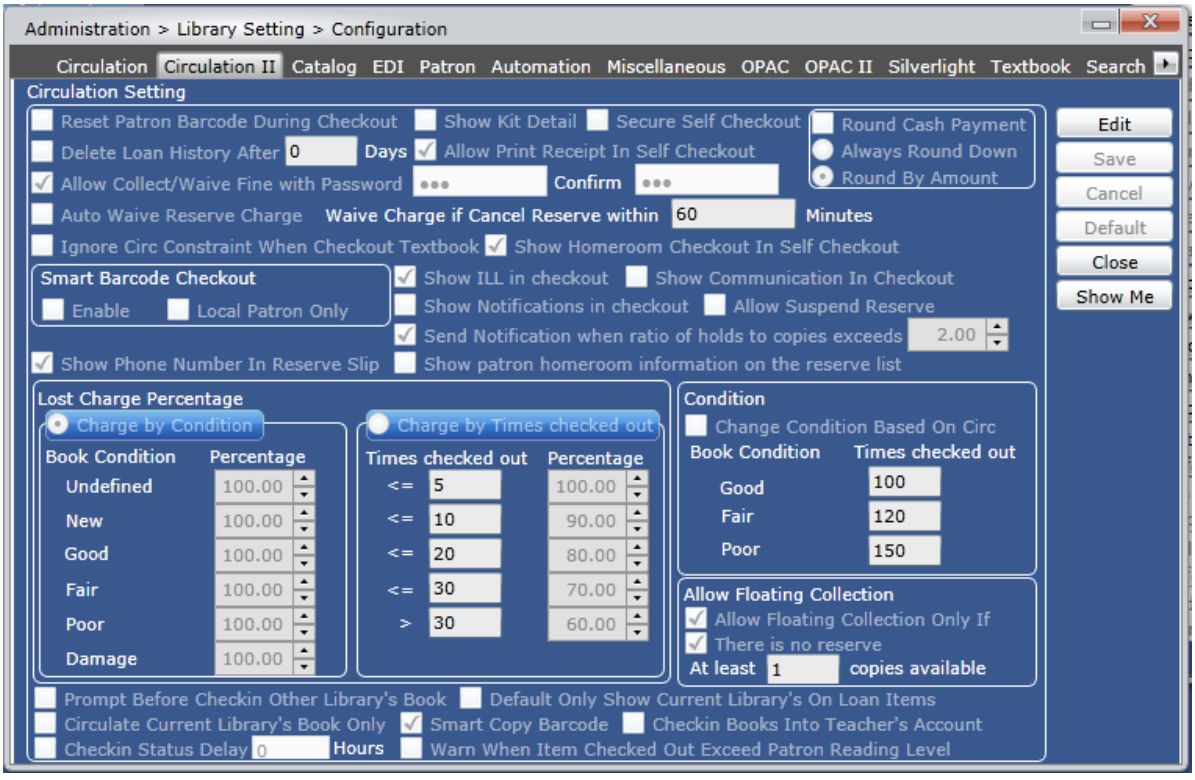
Delete Loan History After # Days
Loan history can be deleted based on the amount of days it has been held. To set the amount of days to maintain loan history, enter the amount of days in the field labeled Days.

Ignore CIRC constraint when checkout Textbook
Select this feature to allow automatic override of circulation type settings when checking out textbooks.

Auto Waive Reserve Charge
If there is a charge for reserving an item (set in menu **Administration > Library Setting > Circulation Type > Patron Circ Type** tab), the system will waive the charges if reserve is cancelled within the time specified.

Allow Print Receipt in Self-Checkout
Select to enable the Receipt Printer option available in Self-Checkout mode.

Show Homeroom Checkout in Self-Checkout
Select to display Homeroom checkout in Self-Checkout mode.



Show ILL in checkout
Select to display ILL tab in the checkout window.

Show Communication in Checkout
When enabled communication tab appears in the checkout window.

Show Notifications in Checkout
When enabled Notification tab appears in the checkout window.

Allow Floating Collection
If this feature is selected, when an item is returned in another library, the book stays there if there is no reserve in the owning library.

Send Notification when ratio of holds to copies exceeds
Select this setting to alert library staff when the ratio of holds to copies exceeds the limit set here.

Show patron homeroom information on the reserve list
Homeroom will appear on the reserve list.

Smart Barcode Checkout

Enable
Allow patron information to load from a patron barcode scanned into the field in checkout window from any library.

Local Patron Only
Allow patron information to load from a patron barcode scanned into the field in checkout window from local library only.

Lost Charge Percentage

Charge by Condition
Use this feature to charge lost fines according to the books condition by percentage.

Charge by Times checked out
This will take a percentage of the lost charge based on the times the book is checked out.

Condition

Change Condition based On Circ
This will change the condition of the book based the number of times checked out.

Prompt before Checkin Other Library's Book
If the copy checked in belongs to another library site, the system will prompt when barcode is scanned for checkin.

Circulation Current Library's Book Only
Do not allow books from other library sites to checkin at your library site.

Checkin Status Delay # Hours
How long a copy should stay in "to be shelved" status before it becomes fully checked in.

Default Only Show Current Library's On Loan Items
Set a default to show only show on loan items from the current login library and not all libraries.

Smart Copy Barcode
This setting will tell the difference between patron barcodes and copy barcodes in the check out window.

Checkin Books into a Teacher's Account
When turned on, a dropdown menu will appear in the Check In window including names of staff to whom the books can become checked in. The checked in item will appear in the teacher's check out window in the items on loan tab.

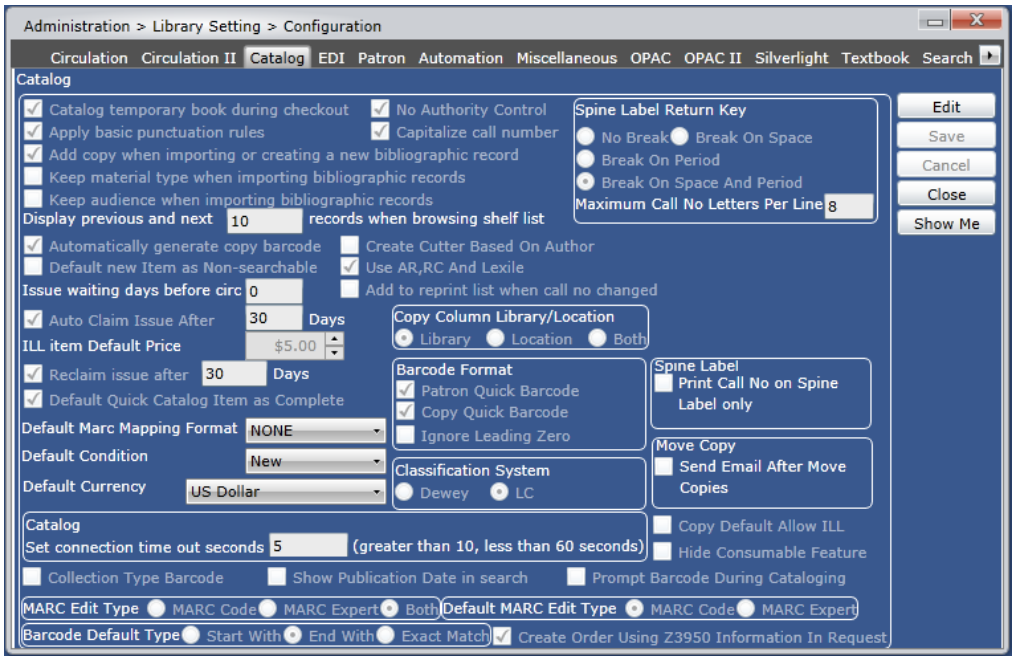
Warn When Item Checked Out Exceed Patron Reading Level
When a patron's reading level is specified and a book with a higher reading level is being checked out to them, the system will prompt with a warning saying the book is above the patron's reading level.

Configuration > Catalog

Configuration Module

Various settings can be set to configure the Cataloging Module in the Catalog Tab. The settings in this section can be broken down by:

1. Cataloging Settings
2. Barcode/Spine Label Settings
3. Default Search Options



Catalog temporary book during checkout

When enabled, all items cataloged during checkout are marked as Temporary by default. Temporary items can be automatically deleted after check in if a setting is enabled. Enable this setting by selecting Delete Temp item after check in setting within **Configuration > Circulation**.

No Authority Control

Organize library authority records under a single, distinctive name in the system.

Apply basic punctuation rules

MARC punctuation rules will apply if this checkbox is selected.

Capitalize call number

All New call numbers will be displayed in upper case if this checkbox is selected.

Add copy when importing or creating a new bibliographic record

The system will prompt to create a copy record after creating a MARC record if this checkbox is selected.

Keep material type when importing bibliographic records

The material type will be imported with the associated MARC record if this checkbox is selected. It is recommended that this setting is not enabled.

Keep audience when importing bibliographic records

The audience type will be imported with the associated MARC record. It is recommended to uncheck it this setting if this checkbox is selected.

Bypass authority validation
If this checkbox is selected then validating authority for author and subject is bypassed. This setting should be disabled if the library has authority records.

Display previous and next records when browsing shelf list
This field provides the ability to select the number of records shown in the shelf list screen.

Automatically generate copy barcode
Check this box to automatically create new barcodes to newly cataloged items.

Create Cutter Based On Author
Creates a call number based on Dewey number and author automatically.

Default New Item as Non-searchable
If this item is selected, new items being added will not be searchable online.

Use AR, RC, and Lexile
The system will show the Reading Program tab in **Catalog > Find/Add Item** if this checkbox is selected. This tab includes Accelerated Reader, Reading count, Fountas and the Lexile programs.

Issue Waiting Days before Circulation
This field allows the number of days to wait before the issue can be circulated to be set.

Add to re-print list when call no changed
The re-print list will become available in the Barcode/Spine label window to reprint recently changed copy call numbers when this box is checked.

Auto Claim Issue After
This setting will set a claim that an issue is missing if not received within the days set here.

ILL Item Default Price
This field allows a default price for all ILL items to be set.

Reclaim Issue After
If this selection is checked, a Reclaim letter will be created after so many days of the items being claimed and not received.

Default Quick Catalog Item as Complete
If this checkbox is selected, cataloging done through quick cataloging will be marked as complete.

Default MARC Mapping Format
Specify MARC mapping used during import.

Default Condition
Specify default condition for new items being added.

Default Currency
Specify the currency for all accounting-related records in the system.

Catalog

Set connection time out seconds
Specify how long the system should try to connect to Z39.50 servers before timing out in seconds.

Collection type barcode
This setting allows duplicate barcodes in different collections. It provides a dropdown menu in checkout that enables the collection type to be selected in the case of duplicate barcodes.

Show Publication date in Search
Show the Publication date in the Find/Add item window.

Copy Default Allow ILL
Check this box to Allow Interlibrary Loan to be selected as the default when creating a new copy.

Hide Consumable Feature
Check this box to hide all of the consumable checkboxes in the different modules and stop consumable items from being checked out.

Prompt barcode during cataloging
Enable to be prompted to enter a barcode when barcode field is left blank and Save has been clicked. This setting provides the user the option to generate a barcode automatically or enter one manually.

MARC Edit Type

Specify the preferred cataloging interface:

MARC Code
Show MARC Code in the Find/Add Item window tabs.

MARC Expert
Show MARC Expert in the Find/Add Item window tabs.

Both
Show both MARC Code and MARC Expert in the Find/Add Item window tabs.

Default MARC Edit Type

MARC Code
Edit the MARC Code in the MARC Expert window tabs.

MARC Expert
Edit the MARC Expert in the MARC Expert window tabs.

Create Order Using Z39.50 Information in Request
When creating new orders from Find/Add New Request, this option will automatically search Z39.50 for a matching record based on the information from this window. If deselected, the new order will simply include the typed information from the customer.

Barcode Default Type

Start With
Specify the default barcode search format in Find/Add item as Start With.

End With
Specify the default barcode search format in Find/Add item as End With.

Exact Match
Specify the default barcode search format in Find/Add item as Exact Match.

Spine Label return key

When the number of characters runs out in the spine label format, the call number will break and start on a new line for any of these settings. However, depending on the settings used more spine label line breaks may be introduced.

No break
The call number will fit on one line only.

Break on space
The call number will break and start on a new line entered when a space is present.

Break on period
The call number will break and start on a new line entered when a period is present.

Break on period and space
The call number will break and start on a new line entered each time a period or a space is present.

Maximum Call No Letters Per Line
Set these options to select where call numbers will break on the spine labels.

Copy Column Library/Location

Library
The library name only will appear in the copy grids.

Location
The location name only will appear in the copy grids.

Both
Both the library and location name will appear in the copy grids.

Barcode Format

Patron Quick Barcode
Automatically normalize a patron barcode to 14 digits when entered.

Copy Quick Barcode
Automatically normalize a copy barcode to 14 digits when entered.

Ignore Leading Zero
Ask the system not to read zeros at the beginning of the barcode.

Classification System

Dewey
Select Dewey records to show in your system and for your import files.

LC
Select Library of Congress records to show in your system and for your import files.

Spine Label

Print Call No on Spine Label
Select this setting for the call number to print on spine label only.

Move Copy

Send E-mail after Move Copies
If this setting is enabled, an email will be sent to the user when the move copies feature is used.

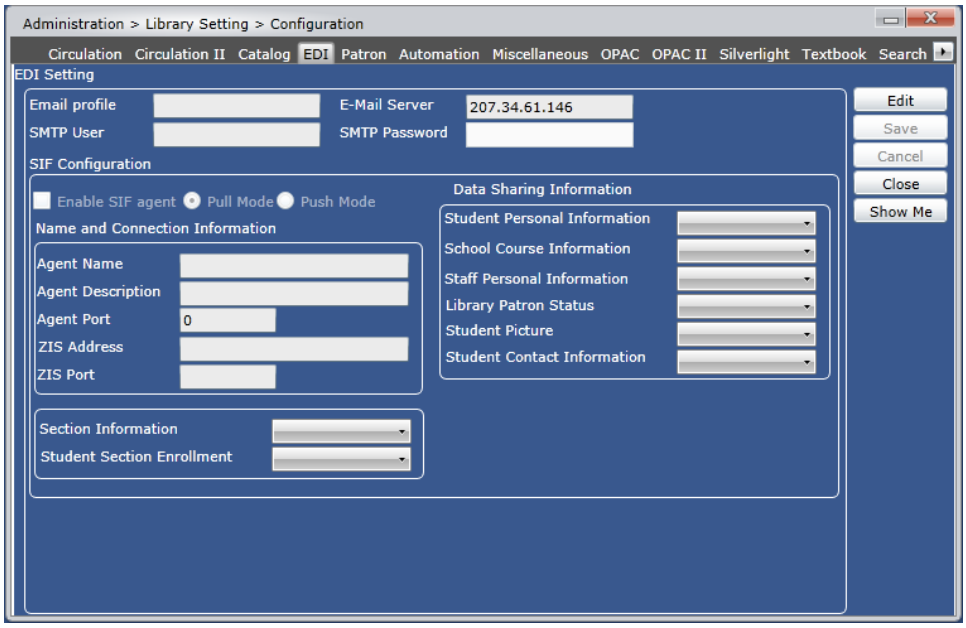
Configuration > EDI

The settings for EDI and SIF communication can allow the sharing and processing of information with parties outside the library. EDI is used when placing orders. Libraries and vendors can share information for the invoices message, the Order Responses message, and the Quotes Message. This can allow the database to update the following information:

1. Responses in the Order Details window.
2. Pricing information in the Quotes window.

EDI Setting

1. Email profile: This profile is used on the SQL server.
2. E-Mail server: The e-mail server is identified as an IP Address.
3. SMTP Password
4. SMTP User



Name and Connection Information

SIF is used when importing student information under the Patron module. It can be enabled by clicking the checkbox “Enable SIF Agent”. The information required for a connection to a SIS includes:

1. Agent Name
2. Agent Description
3. Agent Port
4. ZIS Address
5. ZIS Port

Data Sharing Information

The section on “Data Sharing Information” specifies data that gets passed back and forth between your SIS and ILS systems including the following:

1. Student Personal Information
2. School Course Information
3. Staff Personal Information
4. Library Patron Status
5. Student Picture
6. Student Contact Information
7. Section Information
8. Student Section Enrollment

Configuration > Patron

In the patron configuration tab includes the following settings:

1. Library Card Expiry Date
2. Pictures
3. Patron Default Password, ID, and Barcode
4. Patron Search Defaults
5. Circulation Type Constraints
6. Patron Collection Recommendation

Library Card Expiry Date: Default Expiry Date

Same as Issue Date
Make the library cards expire on the same date as the issue date.

The End of the Academic Year
Make the library cards expire at the end of the academic year.

Library Card Expiry Date: Valid Period

Default Value # Years
Choose a specific number of years for a library card to expire.

Base on Grade

Choose a grade for students when the library card should expire.

Pictures

Show Picture
This option must be selected for patron pictures to be displayed.

Default Picture Name

Patron Barcode
Choose this option to attach patron records to patron barcodes.

Patron ID
Choose this option to attach patron records to patron ID.

Save patron picture in following path
Specify the path for patron pictures.

Search Patron by

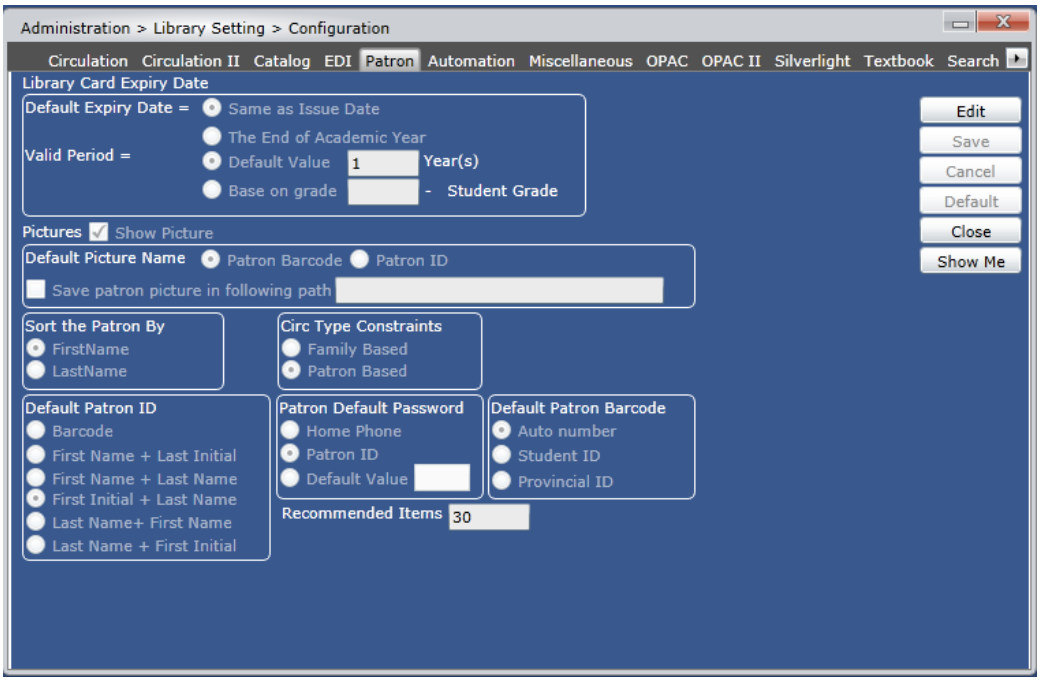
FirstName
Sort the Find/Add Patron search by the Patron First Name.

LastName
Sort the Find/Add Patron search by the Patron Last Name.

Circ Type Constraints

Family Based
This will set the circulation type to family based cards

Patron Based
This will set the circulation type to patron based cards.



Default Patron ID

Select one of the five options as the default patron login ID password for all new patrons being added: Barcode, First Name + Last Initial, First Name + Last Name, First Initial + Last Name, Last Name + First Name, Last Name + First Initial

Patron Default Password

Select one of the three options as the patron password default for new patrons being added: Home Phone, Patron ID, Default Value.

Default Patron Barcode

Select one of the three options as the default patron barcode for new patrons being added: Auto Number, Student ID, Patron ID.

Recommended Items

This field is a collection development guideline that appears in **Collection Analysis > Library Information**. The number entered in this field is the recommended items per patron in the library.

Configuration > Automation

The Automation Configuration window provides access to settings related to warning sounds, email communications, spell check, and other library login settings.

Automated Email Notification

Schedule automatic email notifications to be sent to patrons.

No notification for my school

Select this checkbox to cancel all notifications from sending.

Every day at # execute daily check program

Set a specific time of day when automation will check for notifications to send.

Every # day(s) send email to patrons and their homeroom teacher.
Set a specific interval of days when the system will send out all of the notifications found.

Email Notification Overdue Message
Select a system message type that will be used for formatting the overdue message.

Days Overdue
Send a message at a specified number of days it becomes overdue.

Email Notification Pre-Overdue Message
Select a system message type that will be used for formatting the pre-overdue message. When set to blank, the pre-overdue message does not send.

Days About To Overdue
Send a message at a specified number of days before it becomes overdue.

Fixed Day Notification
Select a specific day of the week from the dropdown when the notification will send.

Create Warning Message to a Patron

A warning message can be selected to be sent out under certain conditions set here.

If Patron's Fine Exceeds $
A warning message will send if a patron's fine exceeds a specified amount.

If Number of Overdue Items exceed #
A warning message will send if a patron's overdue items exceed a specified number.

If patron's card expires in # days
A warning message will send if the patron's library card expires in a specified number of days.

Spell Check Language

Specify spell check language used: Canadian English or American English.

Insignia Library

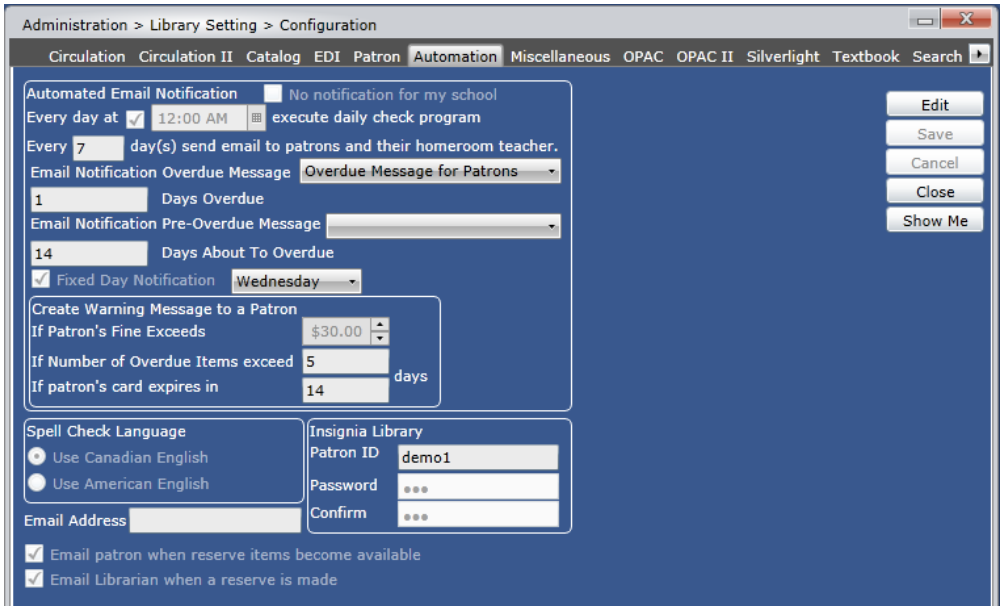
These fields specify the login information including patron ID and password for other libraries to allow them to connect to the library to search for items.

E-mail Address

Specify the e-mail address that sends notifications to patrons.

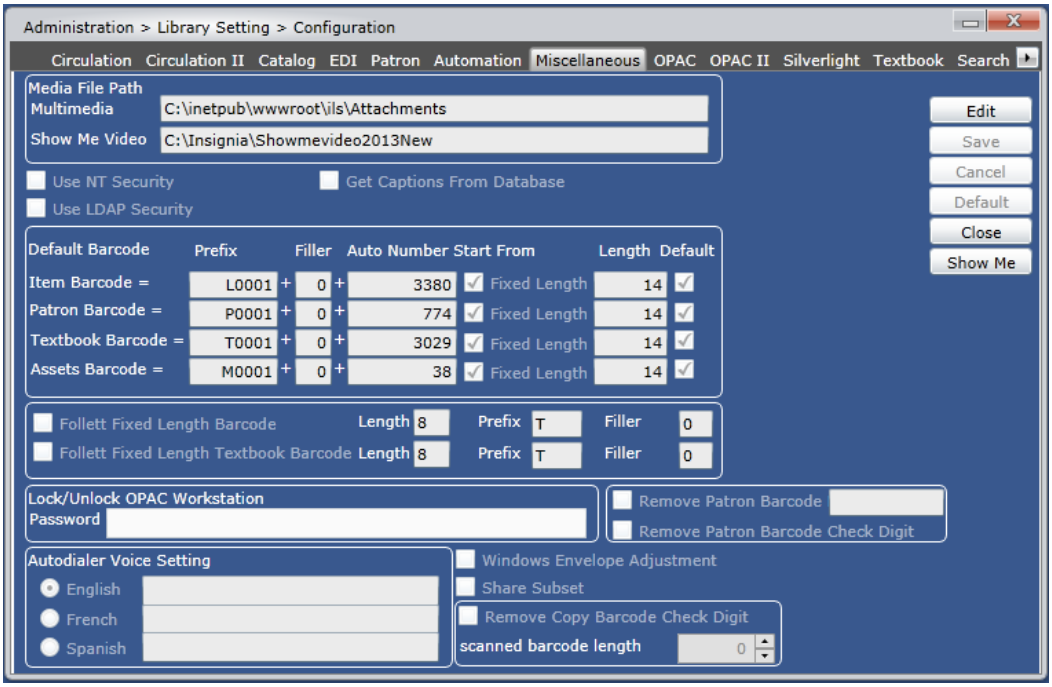
Email patron when reserve items become available
Enables automatic emailing to patrons when an item on reserve becomes available to them.

Email Librarian when a reserve is made
Enables automatic emailing to library staff when a reserve has been placed online.



Configuration > Miscellaneous

This tab includes barcode settings and miscellaneous settings within the system.


Administration > Library Setting > Configuration
Circulation Circulation II Catalog EDI Patron Automation Miscellaneous OPAC OPAC II Silverlight Textbook Search
Media File Path
Multimedia
C:\inetpub\wwwroot\ils\Attachments
Show Me Video
C:\Insignia\Showmevideo2013New
Use NT Security
Get Captions From Database
Use LDAP Security
Default Barcode Prefix Filler Auto Number Start From Length Default
Item Barcode = L0001 + 0 + 3380 Fixed Length 14
Patron Barcode = P0001 + 0 + 774 Fixed Length 14
Textbook Barcode = T0001 + 0 + 3029 Fixed Length 14
Assets Barcode = M0001 + 0 + 38 Fixed Length 14
Follett Fixed Length Barcode Length 8 Prefix T Filler 0
Follett Fixed Length Textbook Barcode Length 8 Prefix T Filler 0
Lock/Unlock OPAC Workstation
Password
Remove Patron Barcode
Remove Patron Barcode Check Digit
Autodialer Voice Setting
English
French
Spanish
Windows Envelope Adjustment
Share Subset
Remove Copy Barcode Check Digit
scanned barcode length
0
Edit
Save
Cancel
Default
Close
Show Me

Media File Path

Note: NT Security and LDAP Security does the same function. Use of either NT or LDAP Security will depend on your network security settings. Contact IT for more details.

Multimedia Path

Specify the multimedia path used to save attachments (such as images) in cataloging.

ShowMe Video
Specify the multimedia path used to save attachments for ShowMe videos.

Use NT Security
If this checkbox is selected, the login will be transparent. To implement this change, the patron ID for the staff must be the same as the network login ID. Using this option will allow the system to use the same login as the network, so only a single sign on is required.

Use LDAP Security
If this checkbox is selected the ILS login will be transparent. To implement this, the ID for the staff has to be same as the network login ID. Once a user is logged into network they will not have to logon in with a password to the library system, so only a single sign on is required.

Get Captions From Database
Check the checkbox to tell the system to update the captions with the changes made from **Administration > Customize Captions**. The program must be restarted to update the database.

Default Barcode

Specify the default barcode scheme for items, patrons, and textbooks. The prefix, starting point, and length of barcodes can be specified.

Prefix
The prefix column, will take any desired alphanumeric prefix (up to six characters). This will be the prefix that is automatically assigned when barcodes are generated for new item copies and new patrons.

Filler
This field will fill the numbers between the Auto Number and Prefix with a given Character

Auto Number Start From
In the AutoNumber Start From column, specify the number of the first item or patron barcode (subsequent numbers increase by an increment of 1).

Length
The barcodes may be set to a fixed length. A maximum of 14 characters, including leading zeros, is permitted.

Default
This will set the following barcode settings as the default for new barcodes created in the applicable modules.

Follett Fixed Barcode Barcode
These settings will remove extra characters from library barcodes that the Follett system added. This setting allows barcodes from old Follett systems to be scanned into the system.

Follett Fixed Barcode Textbook Barcode
These settings will remove extra characters from textbook barcodes that the Follett system added. This setting allows barcodes from old Follett systems to be scanned into the system.

Lock/Unlock OPAC Workstation

Password
Specify the password to unlock public workstations without booking. To use this feature on a public access workstation, select the Unlock radio button and enter the password. This will be used when setting up computer booking workstations.

Autodialer Voice Setting

Set the language for the Auto Dialer program from: English, French, and Spanish.

Remove Patron Barcode
This setting enables the patron barcode prefix to be removed when it exists in the barcode or appears when scanned into a Notepad and does not appear in the system attached to the patron. For example, E001234 appears when scanning but only 1234 is shown in the patron barcode in the system. Check this checkbox and enter E00 in the adjacent field to ignore the patron barcode prefix.

Remove Patron Barcode Check Digit
This setting removes the check digit at the end of patron barcodes. The check digit is additional letters, numbers, or symbols at the end of the barcode. If the check digit appears when the barcode is scanned into Notepad but does not appear as attached to the patron barcode in the system check this box.

Windows Envelope Adjustment
When this setting is selected, the address of patrons on the overdue message report (**Reports > Circulation**) is formatted to fit envelopes with windows.

Share Subset
Subsets are attached to individual logins. Enable this setting to share subsets with other users within the same library site.

Remove Copy Barcode Check Digit
This setting removes the check digit at the end of copy barcodes. The check digit is additional letters, numbers, or symbols at the end of the barcode. If the check digit appears when the barcode is scanned into Notepad but does not appear in the copy barcode in the system check this box. Enter the number of digits in the scanned barcode including the check digit in the below field.

Configuration > OPAC

In Insignia Library System, OPAC configuration is customizable. Staff can choose to enable and disable different features of OPAC in real-time. The settings available in OPAC Configuration are:

1. OPAC Patron Permissions
2. OPAC Search Settings
3. OPAC Features Configuration
4. OPAC Connection Configuration

Setting Patron Permissions on OPAC

Session timeout
Set the amount time that passes before the system will reset the browser due to inactivity.

Page size
Specify the number of records to be shown per page.

Default Skin
Set the default skin color to be displayed in the OPAC.

Relevance Weight
Set the weight by the specified number of times. If the word appears once in the title and once in the subject, the weight will become 1x the title weight + 1 x the subject weight when the number is set to "1" respectively. The results with the largest total weight will show on top with the rest of the results in a descending order. "Other" is all searchable tags not including Title, Author, Series, Notes, or Subjects. Those are listed under the following menu: Catalog > Setting > Keyword Tags Definition.

Allow Inter Library Loan
If this setting is selected, it enables patrons to make ILL requests on the OPAC.

Allow patron to change Personal information
If this setting is selected, it enables patrons to change their profile on the OPAC.

Allow patron to renew
If this setting is selected, it enables patrons to renew books on the OPAC.

Allow patron to reserve
If this setting is selected, it enables patrons to reserve books on the OPAC.

Allow patron to book
If this setting is selected, it enables patrons to book.

Browse Author and Subject index
Turn this on to view the index list of Authors and Subjects when doing an Author or subject search. Leave this setting disabled to view records only in results.

Minimum search character
Specify the minimum number of characters to be entered in the OPAC during a search.

IP Address Range
Specify the IP address range so library is automatically selected.

IP Address Range (ipv6)
Specify the IP address range in IPV6 format so library is automatically selected.

Power Advanced Search for School
Set to turn on Power Advanced search feature.

Show One Library
If checked, show only the library name in the list.

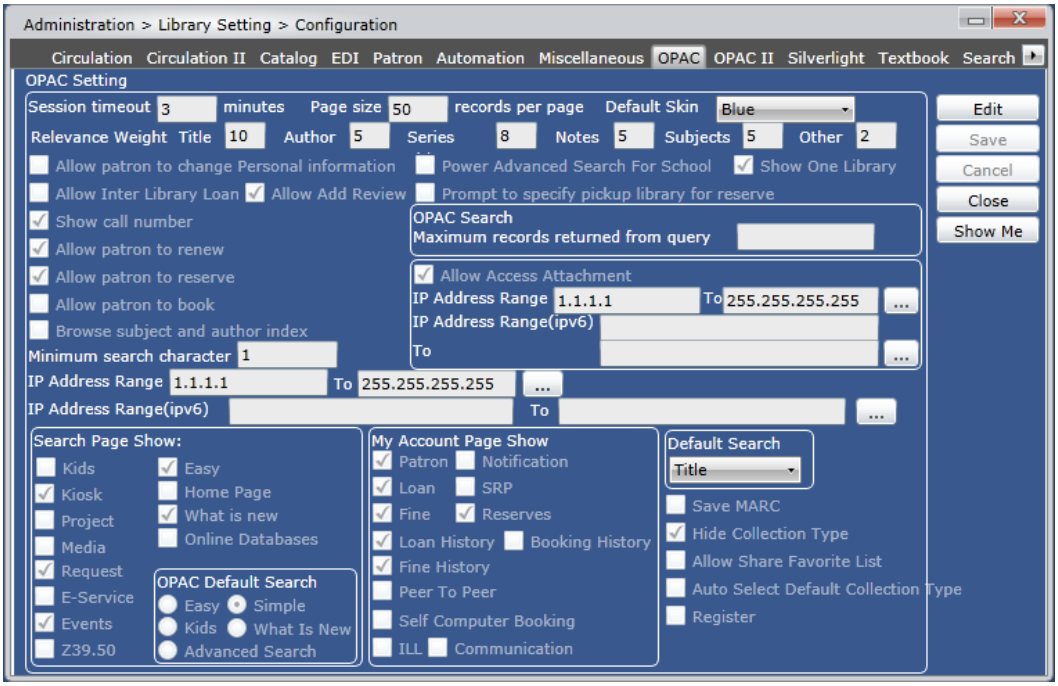
OPAC Search

Maximum records returned from query
Specify how many records should be returned in OPAC search.

Allow Access Attachment
Turn on to allow attachments to be added to records.

IP Address Range
Specify the IP address range that will allow attachments on records to appear.

IP Address Range (ipv6)
Specify the IP address range in IPV6 format that will allow attachments on records to appear.



Search Page Show

Kids
If enabled show Kids search in OPAC.

Kiosk
If enabled show kiosk search in OPAC.

Project
If checked, the project feature will be available in the OPAC.

Media
If checked, the media booking feature will be available in the OPAC.

Request
If this setting is selected, it enables patrons to make requests for new books.

E-Service
If checked the Cloud Search will appear in the OPAC.

Events
If selected, the Events feature will be available in the OPAC.

Z39.50
Allow the Z39.50 module in the OPAC.

Easy
Turn on to access the easy search in the OPAC.

What's New
Enable this feature to show the What's New box in the OPAC.

Online Databases
Turn on to show Online databases in the OPAC.

Simple Search Show

Turn on here is you want to see: simple search, easy search or both in the OPAC.

OPAC Default Search

Turn on here is you want to see: simple search, easy search or kids search in the OPAC.

My Account Page Show

Turn on the tabs you want to see in my account including:

Patron
If this setting is checked the patron's profile will show in the OPAC.

Notification
If this setting is checked the patron's social networking notifications will show in the OPAC.

Loan
If selected, items that have been checked out will appear in the OPAC.

SRP
If selected, the Summer Reading Program information will appear in the patron's profile in the OPAC.

Fine
If enabled, outstanding fines will appear in the OPAC.

Reserve
If enabled, the reserve list will appear in the OPAC.

Loan History
If enabled, loan history will appear in the OPAC.

Fine History
If enabled, fine history will appear in the OPAC.

Peer to Peer
If enabled, the peer to peer networking functions under My Account page

Self-Computer Booking
If enabled, Self-Computer Booking will appear in the OPAC.

ILL
Set to turn on interlibrary loan tab in My Account.

Communication
Set to turn on Communication tab in My Account .

Default Search

If enabled, one of the following can be selected as a default search: keyword, relevance, title, author, subject, call no, series.

Save MARC
If this feature is enabled the ability to save a MARC record in the OPAC becomes available.

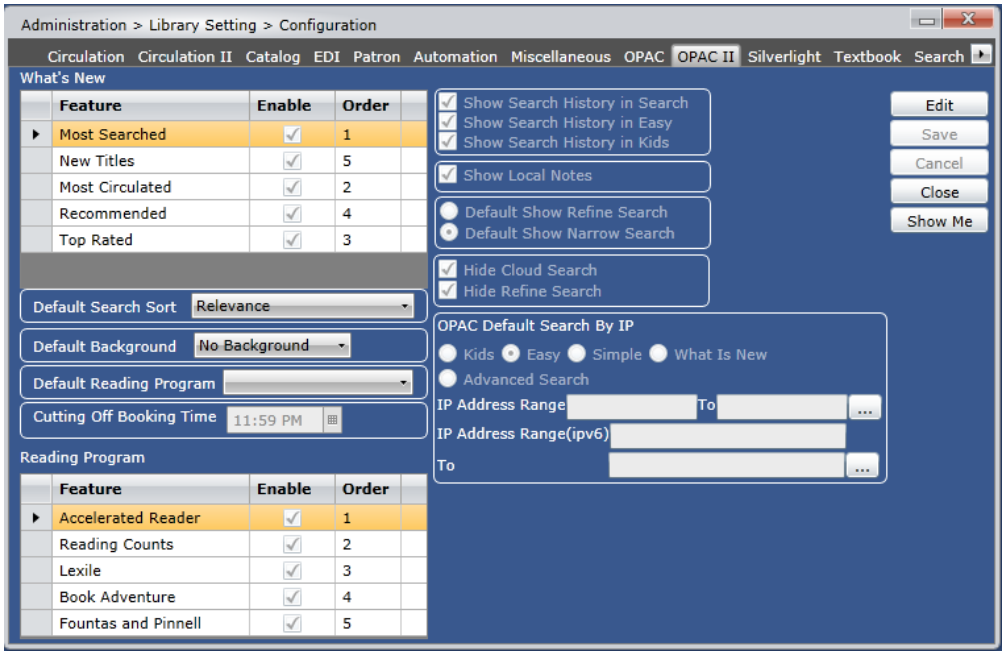
Hide Collection Type
Turn this feature on to hide all collection types in the OPAC.

Allow share favorites
If this setting is selected, it enables patrons to be able to share their favorites lists.

Auto Select Default collection type
Set this setting for the OPAC to automatically select the default collection type for searches.

Register
If enabled, the online self-registration feature will be available in the OPAC.

Configuration > OPAC II



Show Search history in Search
Turn on to show search history in search window.

Show Search history in Easy
Turn on to show search history in easy search window.

Show Search history in Kids
Turn on to show search history in Kids search window.

Show Local Notes
If Show Local Notes is enabled then notes entered in the Copy Information screen will be keyword searchable in the OPAC.

Default Show Refine Search
This will default to the checkboxes that can be selected for categorical searches on the left-hand side.

Default Show Narrow Search
This will default to the count of results by category with links to the results.

Default Search Sort
Set how What's New tab boxes are to be sorted.

Default Background
Set which color the background will automatically display.

Default Reading Program
Set which Reading Program the OPAC will show in the results.

Cutting Off Booking Time
Select a time when…

OPAC Default Search By IP

Select one of the search tabs you wish to control with an IP Address Range: Kids, Easy, Simple, What Is New, and Advanced Search.

IP Address Range
This selects a range of computers that will have permission to view the search tab selected by IP Address.

IP Address Range (ipv6)
This selects a range of computers that will have permission to view the search tab selected by IP Address.

Configuration > Silverlight

Max Upload capacity
Specify the maximum file size that that can be uploaded as an attachment.

Default Themes
Set the default skin for Silverlight.

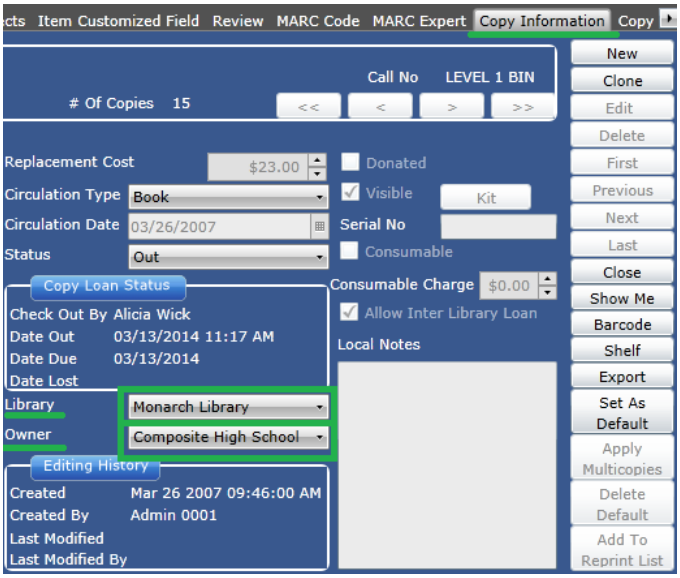
Homeroom Checkout Picture layout
Set the number of rows and columns are to appear in the Homeroom check out.

Shrink Picture
Shrink pictures that are too large in the homeroom checkout window or patron windows.

TwitterID/FacebookID
Add in the ID for Twitter or Facebook that shows in the detail pop-up page of the OPAC.

Move Copies during checkout
Turn on to enable moving copies from other libraries to the local library when the barcode is scanned in the checkout window. If "Allow floating collection" settings are turned on, the "move copies" setting will still work; however, the copies will belong to the district overall rather than a local library. Please see further explanation of the "Owner" dropdown menu in the description for the setting "Default Source Library".

Default Source Library
Set the default source library (otherwise known as the Ownership library, not the library where the copy resides. The two dropdowns in Copy Information will show "Library" and then "Owner" to distinguish the two. The default source library changes the "Owner" value but it does not change the library name to which the copy belongs in the Check Out window. See the screenshot below:



Item Copy Patron Columns Customization
Use this feature to set the columns on the Find/Add Patron, Find/Add Item and copy windows.

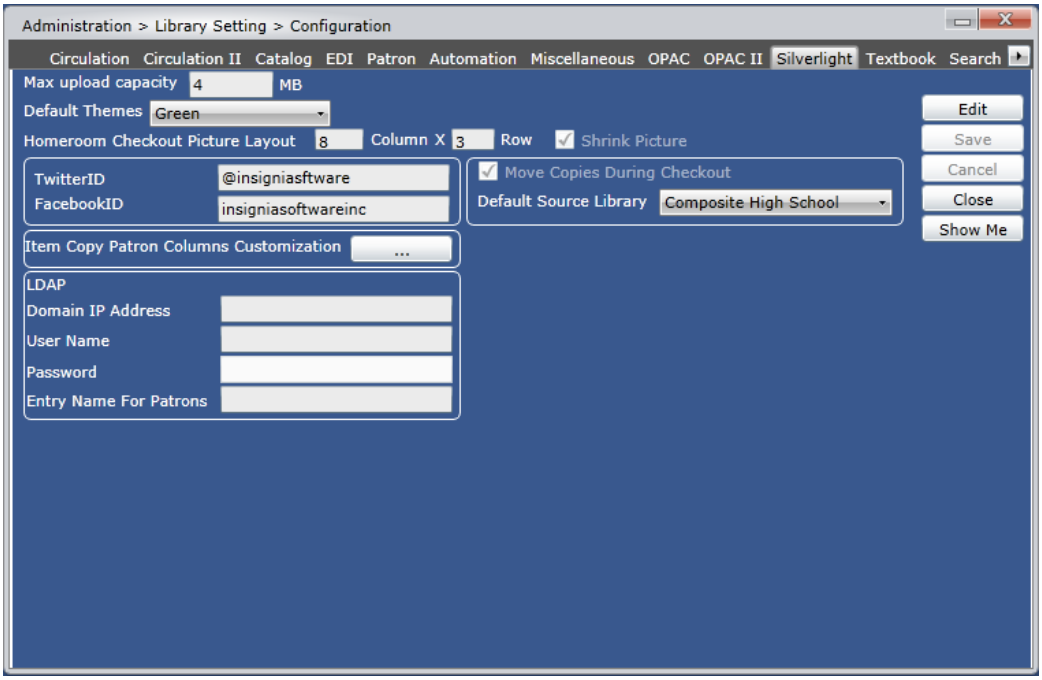
LDAP

Domain IP Address
The Domain IP Address that stores all of the information for patrons' network user id and password.

User Name
A username for the n

Password
Include the overdue fines with the fine of the book if it becomes marked as lost.

Entry Name for Patrons
Include the overdue fines with the fine of the book if it becomes marked as lost.



Configuration > Textbook

Restrict the barcode length to be
Set the textbook barcode to only be a specific number of characters.

Circulate Current Library's Textbook Only
Only take books from the local library's textbook collection.

Default Kits Selected
When checked, the "Show Kits" checkbox will automatically be checked. When unchecked, the "Show Kits" checkbox will automatically be unchecked.

Textbook Kit Fixed Barcode
When this setting is unchecked, “Show Kits” checkbox will appear in Find/Add Textbook. When checked, the “Show Kits” checkbox does not appear.

Fine Lost Charges

times of book price + Processing
This setting determines what amount a patron pays for a lost item. They can pay a fraction of the cost of the book or the entire replacement cost. A Processing fee is also added here.

Overdue fine should be included if a book is lost
Include the overdue fines with the fine of the book if it becomes marked as lost.

Maxi Overdue or Damage Fine should be less than # of times of the book price
The number of times of the book price that for the maximum overdue or damage fine.

Take amount as Book Price if that book price is not set or is zero
Specify an amount to take as book price if item has no or zero book price.

Declare an overdue book as lost, if it’s not returned after another # of days
Use a number of days to declare an overdue book as lost.

Lost Charge Percentage

Charge by Condition
Use this feature to charge lost fines according to the books condition by percentage.

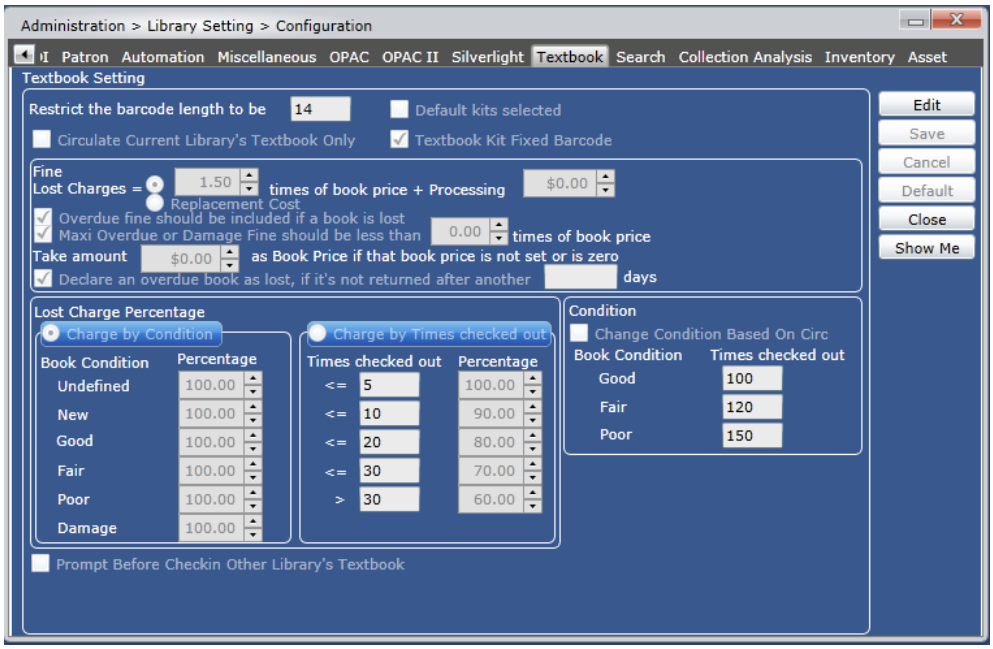
Charge by Times checked out
This will take a percentage of the lost charge based on the times the book is checked out.

Condition

Change Condition based On Circ
This will change the condition of the book based the number of times checked out. The specified number is listed beside each book condition: Good, Fair, Poor.

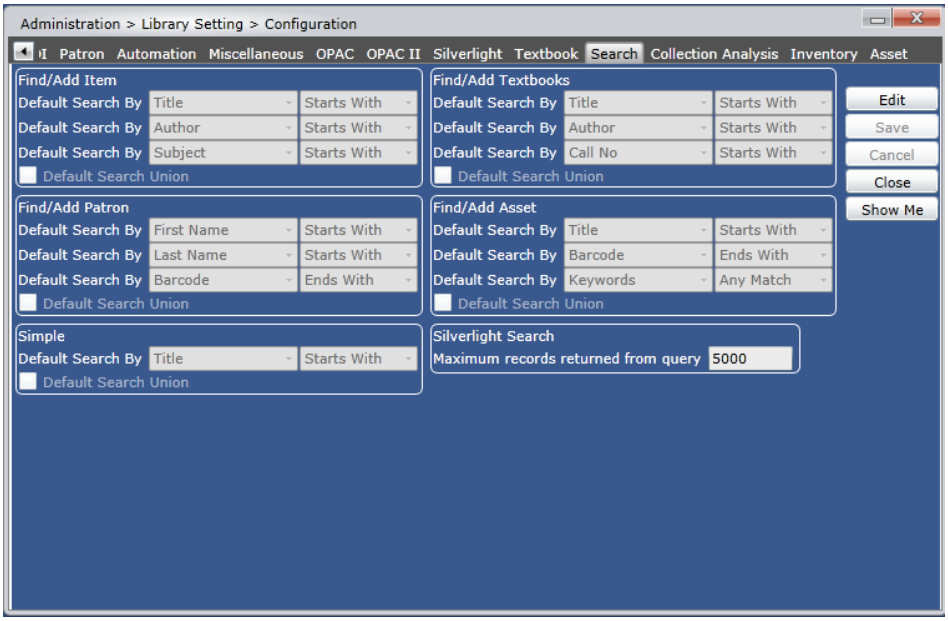
Prompt before Checkin Other Library’s Textbook
If the copy checked in belongs to another library site, the system will prompt when barcode is scanned for checkin.

Configuration Module



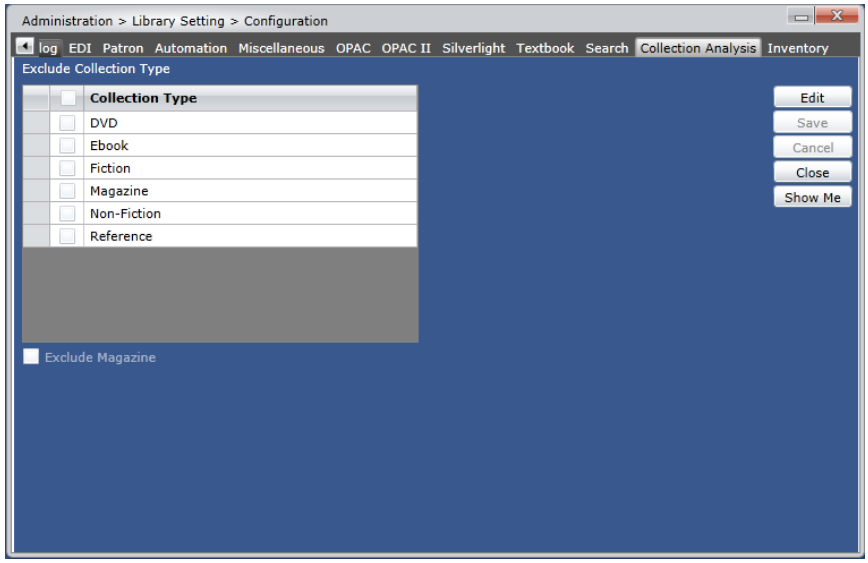
Configuration > Search

1. Find/Add Item Default Search By Select the Search By and Boolean default.
2. Simple Default Search By Select the Search By and Boolean default.
3. Find/Add Patron Default Search By Select the Search By and Boolean default.
4. Find/Add Item Textbooks Search By Select the Search By and Boolean default.
5. Find/Add Assets Default Search By Select the Search By and Boolean default.
6. Silverlight Search Select the maximum records returned by query.


Administration > Library Setting > Configuration
Patron Automation Miscellaneous OPAC OPAC II Silverlight Textbook Search Collection Analysis Inventory Asset
Find/Add Item
Default Search By Title Starts With
Default Search By Author Starts With
Default Search By Subject Starts With
Default Search Union
Find/Add Textbooks
Default Search By Title Starts With
Default Search By Author Starts With
Default Search By Call No Starts With
Default Search Union
Find/Add Patron
Default Search By First Name Starts With
Default Search By Last Name Starts With
Default Search By Barcode Ends With
Default Search Union
Find/Add Asset
Default Search By Title Starts With
Default Search By Barcode Ends With
Default Search By Keywords Any Match
Default Search Union
Simple
Default Search By Title Starts With
Default Search Union
Silverlight Search
Maximum records returned from query 5000
Edit
Save
Cancel
Close
Show Me

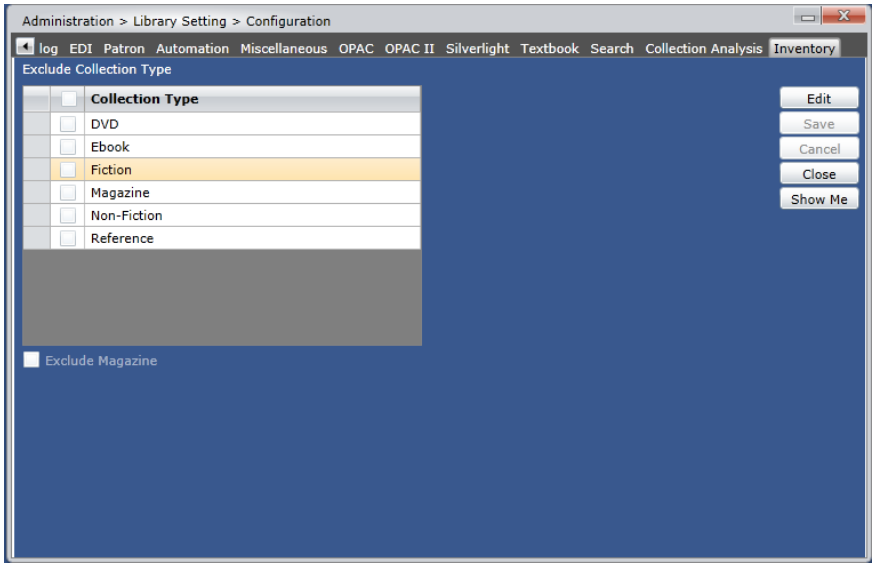
Configuration > Collection Analysis

Exclude magazines and any Collection Types entered into your system. For example:



Configuration > Inventory

Exclude magazines and any Collection Types entered into your system. For example:



Configuration > Asset

Circulate Current Library's Asset Only

Only take books from the local library's asset collection.

Fine Lost Charges

times of book price + Processing
This setting determines what amount a patron pays for a lost asset. They can pay a fraction of the cost of the asset or the entire replacement cost. A Processing fee is also added here.

Overdue fine should be included if a book is lost
Include the overdue fines with the fine of the asset if it becomes marked as lost.

Maxi Overdue or Damage Fine should be less than # of times of the book price
The number of times of the asset price that for the maximum overdue or damage fine.

Take amount as Book Price if that book price is not set or is zero
Specify an amount to take as asset price if item has no or zero book price.

Declare an overdue book as lost, if it's not returned after another # of days
Use a number of days to declare an overdue asset as lost.

Lost Charge Percentage

Charge by Condition
Use this feature to charge lost fines according to the assets condition by percentage.

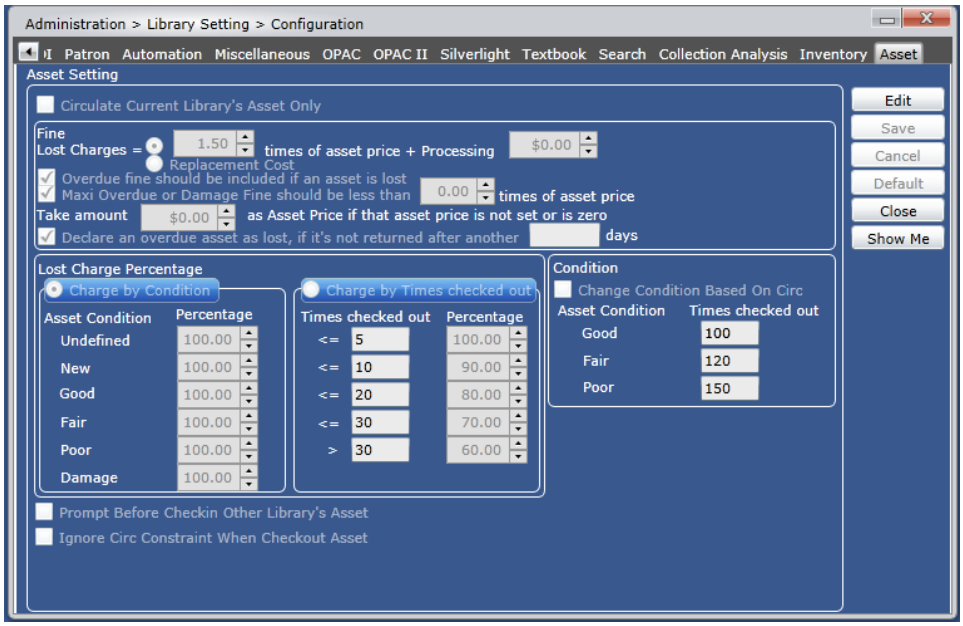
Charge by Times checked out
This will take a percentage of the lost charge based on the times the asset is checked out.

Condition

Change Condition based On Circ
This will change the condition of the asset based the number of times checked out. The specified number is listed beside each book condition: Good, Fair, Poor.

Prompt before Checkin Other Library's Asset
If the copy checked in belongs to another library site, the system will prompt when barcode is scanned for checkin.

Ignore Circ Constraint When Checkout Asset
Select this feature to allow automatic override of circulation type settings when checking out assets.


Administration > Library Setting > Configuration
Patron Automation Miscellaneous OPAC OPAC II Silverlight Textbook Search Collection Analysis Inventory Asset
Asset Setting
Circulate Current Library's Asset Only
Fine
Lost Charges =
1.50
Replacement Cost
times of asset price + Processing
$0.00
Overdue fine should be included if an asset is lost
Maxi Overdue or Damage Fine should be less than
0.00
times of asset price
Take amount
$0.00
as Asset Price if that asset price is not set or is zero
Declare an overdue asset as lost, if it's not returned after another
days
Edit
Save
Cancel
Default
Close
Show Me
Lost Charge Percentage
Charge by Condition
Asset Condition
Percentage
Undefined 100.00
New 100.00
Good 100.00
Fair 100.00
Poor 100.00
Damage 100.00
Charge by Times checked out
Times checked out
Percentage
<= 5 100.00
<= 10 90.00
<= 20 80.00
<= 30 70.00
> 30 60.00
Condition
Change Condition Based On Circ
Asset Condition
Times checked out
Good 100
Fair 120
Poor 150
Prompt Before Checkin Other Library's Asset
Ignore Circ Constraint When Checkout Asset

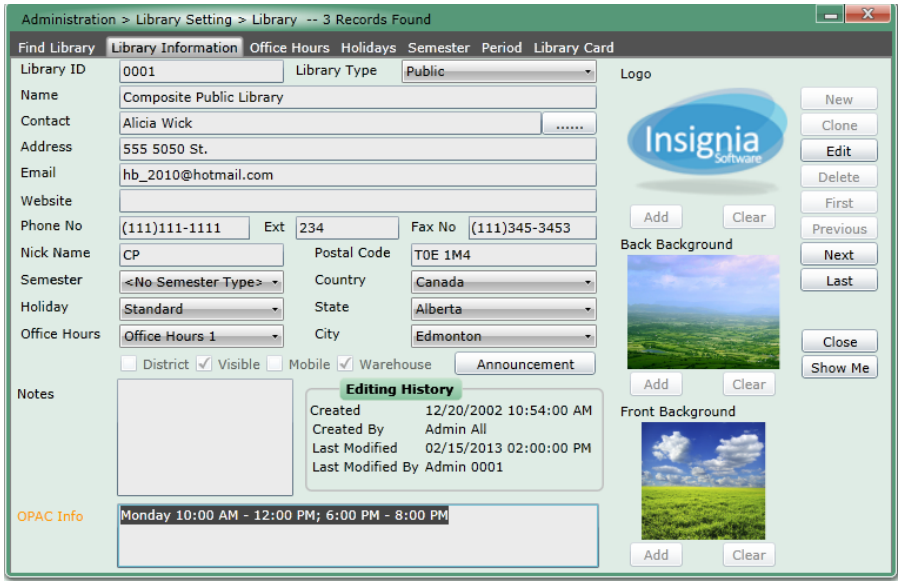
Library Information

The Library Information window provides a profile of the library. When logged in as a library administrator (admin####), only the local library can be modified. Information can be modified on any library when logged in as administrator. To quickly switch locations while logged in as admin####, go to: **Cataloging > Change Library** to change library.

General information about the library (address, phone number, etc.) can be recorded and saved in this window. This information is automatically retrieved when placing an order or sending overdue messages.

Each year, the office hours, holidays, and if necessary, the semester/block must be defined.

1. Click **Administration > Library Settings > Library Information**.
2. Search for the library.
3. Select it and click Detail.
4. Click Edit to modify the profile.
5. Fill in the information needed.
6. The library logo can be uploaded from the database to both the OPAC and the ILS as seen bin the screenshot.
7. Select the checkbox District if the Library being modified or being created is a district office. This will enable the default search to be for all libraries in the district.
8. Make sure to check the visible box to make the library active within the OPAC Interface.
9. Click the Add Logo button to add library logo in the reports.
10. Non-continuous office hours can be added under the OPAC Info tab on the bottom.
11. Click Save.

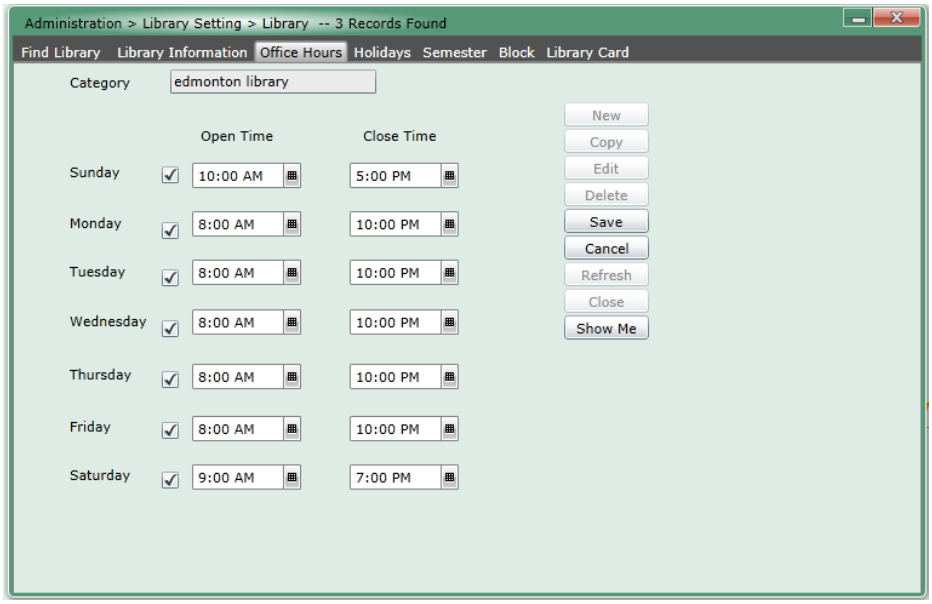


Office Hours

Office hours are used to calculate fines when books are checked out hourly and are also used to determine weekend holidays.

1. Click **Administration > Library Setting > Library Info**.
2. Click Office Hours tab.
3. Select the Category and click Edit or click New to create a new category.
4. Set the library hours.

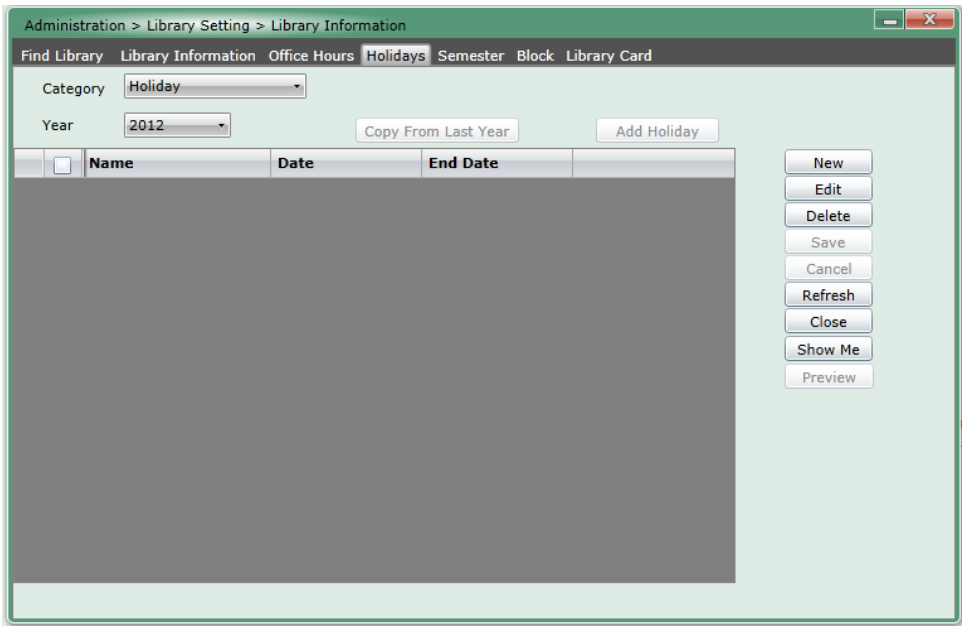
5. To disable the hours for a particular day, uncheck the text box.
6. Click Save.



Holidays

Holidays are used in the calculation of overdue fines. The system can either include or exclude fines for specified holidays.

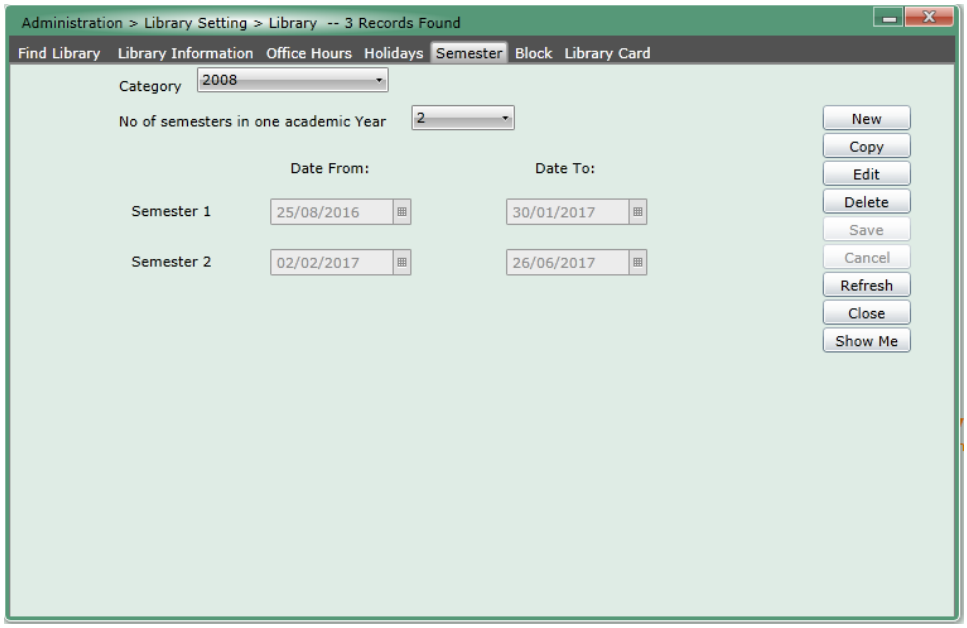
1. Click **Administration > Library Setting > Library Info**.
2. Click the Holidays tab.
3. Select the year.
4. Click New to create a New Holidays and specify a name.
5. Click Add Holiday.
6. Enter a name for the holiday.
7. Specify the date or date range.
8. Click OK.
9. Repeat steps 5 to 7 to add holidays.
10. Click Save.



Semester

Semesters can calculate due dates and can also be used to checkout regular materials or textbooks for academic libraries.

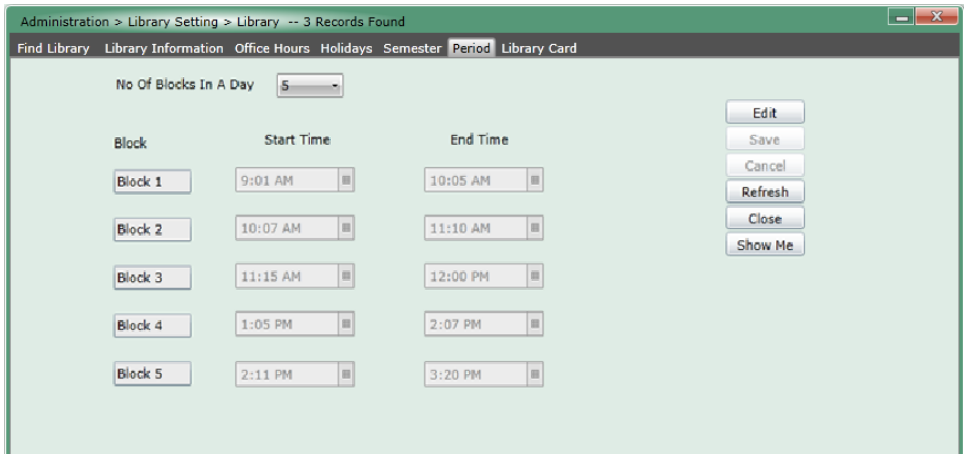
1. Click **Administration > Library Setting > Library Information**.
2. Click the Semester tab.
3. Click New and type category name.
4. Specify the number of semesters.
5. Specify date ranges for semesters.
6. Click Save.



Period

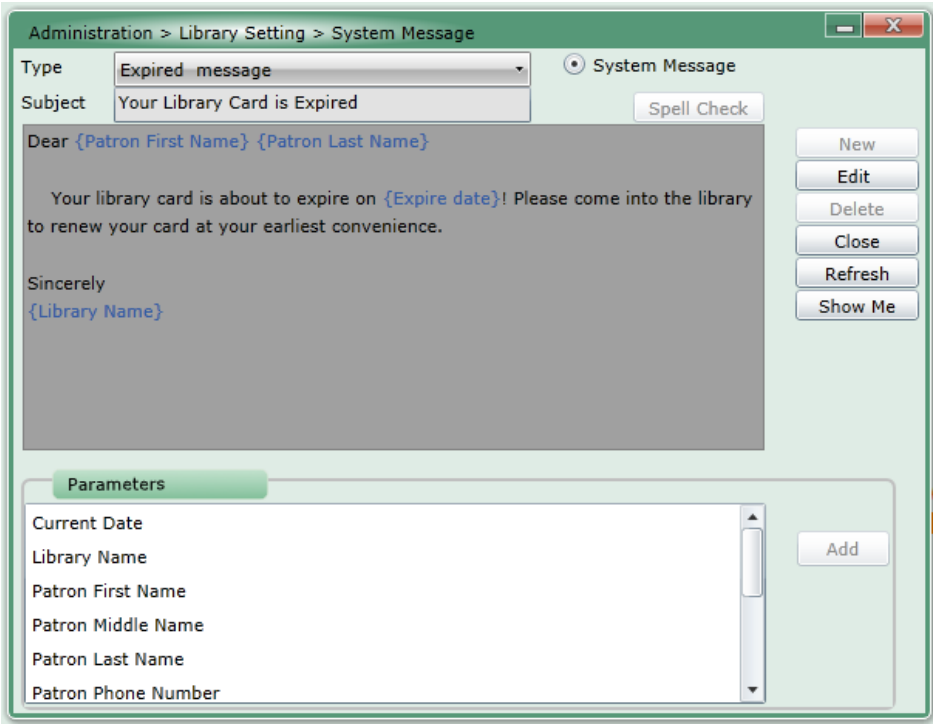
The amount of blocks or periods and the times of these periods can be specified. The times will be used in the library system for Asset bookings.

1. Click **Administration > Library Setting > Library Information**.
2. Click the Period tab.
3. Click Edit.
4. Specify the number of periods.
5. Specify the times for the periods.
6. Click Save.



System Messages

Insignia Library System allows staff to create customized messages that are sent to patrons when required.



Customizable Messages

1. Expired Message
2. 3 different Fine Messages
3. Interlibrary loan request message
4. Magazine Claims
5. 3 different Overdue message for patrons
6. 3 different Overdue message for parents
7. 3 different Overdue message for teachers
8. Overdue Order
9. Recall Message
10. Reserve message
11. Routing message
12. 3 different Textbook overdue message

Edit

1. Click **Administration > Library Setting > System Messages**.
2. Select the System Message radio button.
3. Select a message type from the dropdown list.
4. Click Edit.
5. Add, remove, or move variables. To add a variable Place the cursor where variable is to appear and then select the variable from the list and click Add.
6. Add text or edit any of the text in the message.
7. Click Save.
8. These messages are generated in Report Module. i.e. **Reports > Circulation > Overdue Message**.

Find/Add Summer Reading Program

This window is used to set up and add summer reading programs to the system. This feature tracks how many books patrons need to read prior to getting a prize, reward, or simply program completion.

New or Add a Summer Reading Program

1. Click **Administration > Library Setting > Find/Add Summer Reading Program**.
2. Click New.
3. Enter the program title, gift title, price of the prize, and number of prizes available.
4. Enter the calendar dates in which the program will be completed. The patrons are eligible for the prizes only during this period.
5. Click Save.

Edit or Modify the Summer Reading Program

1. Click **Administration > Library Setting > Find/Add Summer Reading Program**.
2. Select the Search By dropdown to find criteria including the year of the Summer Reading Program and click Find
3. Select the reading program name from the grid below. The bottom grid will display patrons and their reading information.
4. Click Edit to modify the overall Summer Reading Program information including the dates the program will run and the gift information.
5. Click Save.

Reading Program in the OPAC

1. Go to the library URL.
2. Click the My Account link.

2.1. Enter login information if prompted.
3. Click Reading Program tab.
4. In the program name box select the reading program.
5. Enter the Title and Author into the respective fields select the reading date and then click Add.
6. Repeat these steps for all items you will be reading.

Note: If you login with a family card, you can note the books added and read by multiple patrons listed as family members.

7. Once a book is read select it in the list and click Read (systems tracks this item as being read).
8. To view the gifts available click the Gift tab.
9. Clicking on the history tab will show a history of all Summer Reading programs the patron has participated in.

Check Out tab: SRP

The Summer Reading Program **(SRP)** tab shows the current summer reading program selected, program gifts, and reading counts. This tab is used to track the books read by the patron.

1. Click Edit to modify the reading list submitted by the patron.
2. Click Add to add a title.
3. Click Delete to delete a title.
4. Click Save or Cancel on the changes you've made.
5. Type in your initials and click Confirm By to confirm the book has been read.

SRP Gift

The Summer Reading Program (SRP) Gift feature shows all programs, associated patron read counts, and gifts for patrons who meet the program requirements.

5. Click **Circulation > SRP Gift**.
6. Select a patron.
7. Click Confirm to verify book was read**.**
8. Click Edit to add or remove titles read on the patron's book list. Click Save.
9. Click Assign to give patron a gift.
10. Click Unassign to remove the gift from the patron's name.

Miscellaneous Reports

The following reports are available under miscellaneous section:

13. **Summer Reading program:** Lists all summer reading programs.

Events

Events can be created and posted in the library system and appear on the OPAC on the events tab (if enabled in **Administration > Configuration > OPAC**). This feature includes the ability to set a time period for the event, invite patrons to participate, and add pictures. This feature is particularly useful when posting special events, such as author visits or meetings.

1. Click **Administration > Library Setting > Events**.
2. Click New.
3. Enter the relevant information.
4. Start Date and End date will set when this event will show in the Web OPAC.
5. Click Save.

<u>Participant</u>

1. Click Participant tab.
2. Click Add Patron.
3. Search for patrons.

4. Select the patrons and click Apply.
5. When patrons are added click close.
6. E-mail all of the participants:

   6.1. Enter the message and click Send Notification

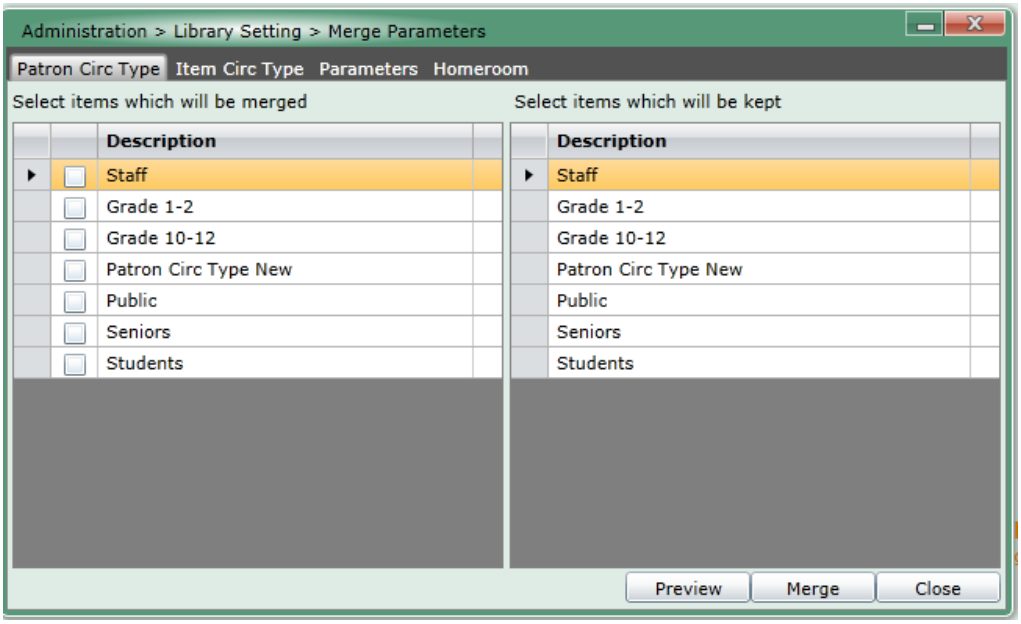
Pictures

1. Click Pictures tab.
2. Click Add picture.
3. Browse the file and select the photo.

Merge Parameters

Parameters, Patron Circ Type, Item Circulation Type, and Homerooms can be merged by using this window and selecting the appropriate tab.

1. Click **Administration > Library Setting > Merge Parameters**.
2. Select the tab for the values to merge**.**
3. Select 1 or more values on the left hand side of the window.
4. Select one value as the type to be kept on the right hand side.
5. Click Apply.

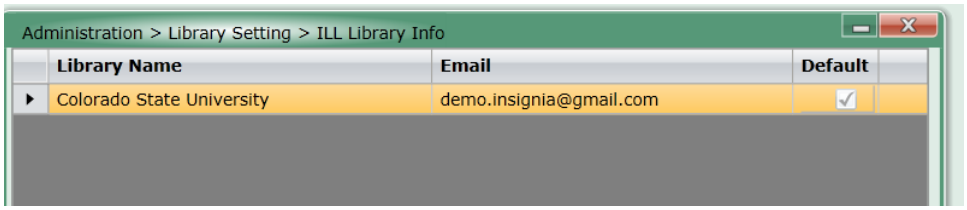


Merge

1. Select one value as the type to be kept on the right hand side.
2. Select two checkboxes beside descriptions for the merge.
3. Click Merge.

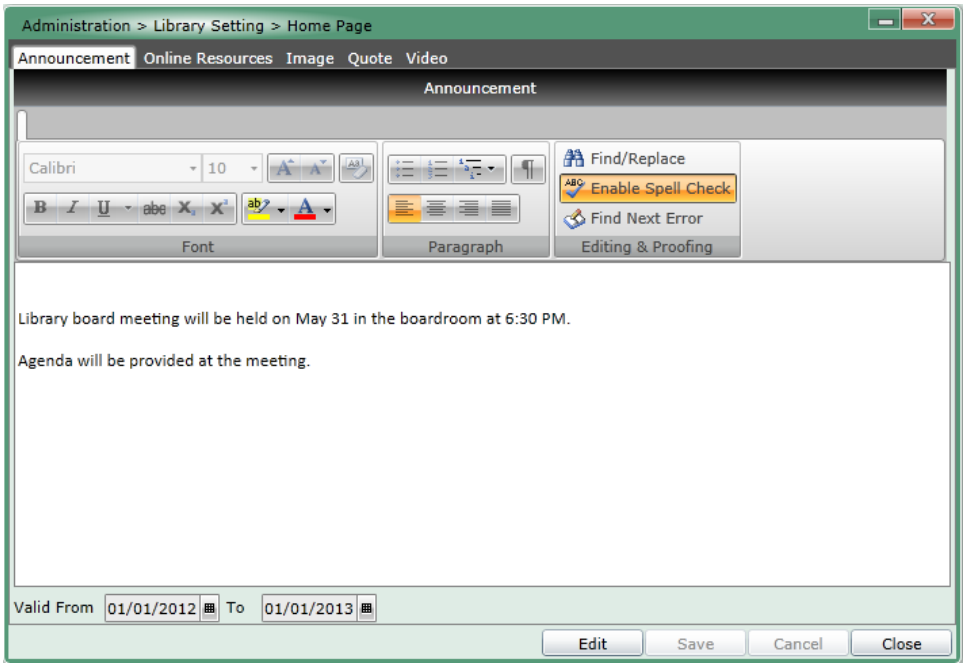
ILL Library Info

Use this window to enter all the libraries that items are borrowed from. These library names can be used when cataloging ILL items.



Home Page

The Home Page can provide announcements, links to online resources, images, quotes supplied by Insignia, and videos for the front page of the catalog.



Map Editor

The Map Editor provides the ability to create a library map that patrons can view on the OPAC to locate an item based on its shelf location in the library. A floor plan must be available to use this feature. To access the library map from the OPAC, search for an item and click the Locate It link.

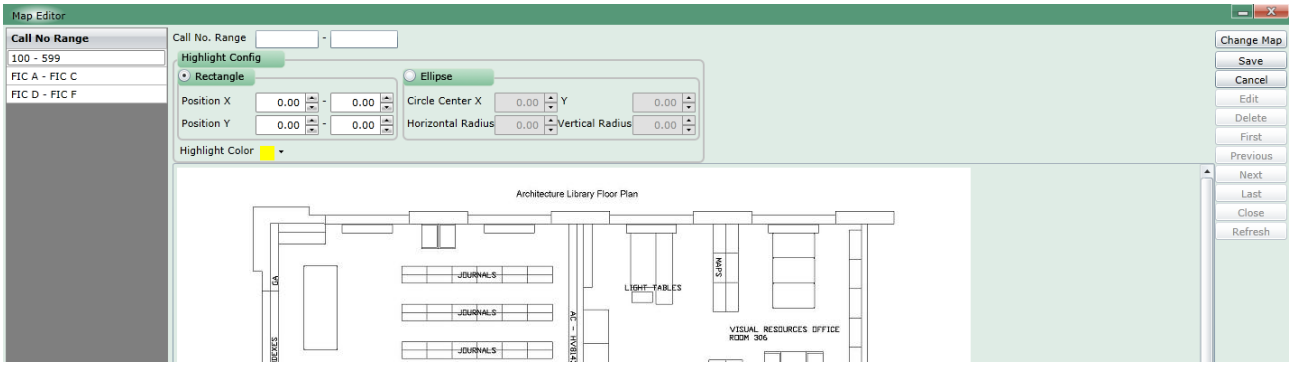
New

1. Click **Administration > Map Editor**.
2. Click New.
3. Click Add Image.
4. Locate the floor plan in your machine.
5. Select floor plan and click OK.
6. Floor plan should now appear in the window in the ILS.
   6.1. If you want to rename the floor plan click Rename.
7. Click OK.
8. Enter the call-number range for a particular shelf to add to the map.
9. Select if the shelving unit is a rectangular shape or an ellipse.
10. Draw the shelving unit or highlight it using the left hand mouse and dragging to create the shape.
11. Click Save.

12. Click New to add another shelf.
13. Follow steps 7-12 to continue to add shelves.

Add Image

1. Click **Administration > Map Editor**.
2. Click New.
3. Click Add Image.
4. Locate the floor plan.
5. Click Open.
6. Select this floor plan by clicking on it.
   6.1. To rename this floor plan click Rename.
7. Click OK and add shelves as shown in the first set of steps.



Clone Parameters

When adding a new site, library branch, or school library to an existing library system it is easier to copy existing parameters than to create parameters if the new site will have the same parameters as an existing site.

Important: Cloning Parameters cannot be reversed. Please contact insignia technical support to confirm any parameters that need cloning before proceeding.

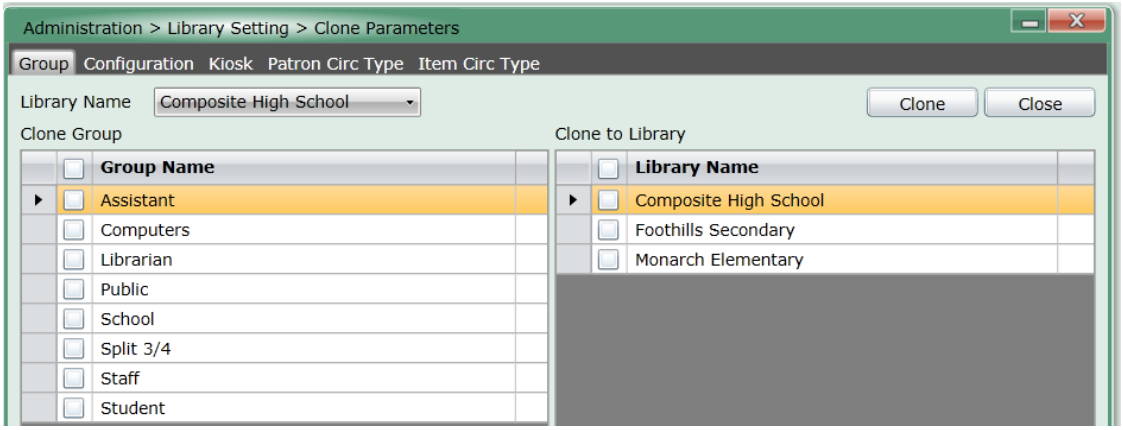
Parameters that can be cloned:

1. Patron Group (i.e. Staff).
2. Configuration Settings
3. Kiosk Categories
4. Patron Circulation Types
5. Item Circulation Types
6. Parameters
   - 6.1. Age Group
   - 6.2. Audience
   - 6.3. Category
   - 6.4. City
   - 6.5. Collection Type
   - 6.6. Country
   - 6.7. Department
   - 6.8. Fine Type
   - 6.9. Language
   - 6.10. Library Type
   - 6.11. Location
   - 6.12. Material Type

6.13. Media Type
6.14. Notification Type
6.15. Place of publication
6.16. Province
6.17. Review Rate
6.18. School
6.19. Tax Rate
6.20. Textbook Material Type

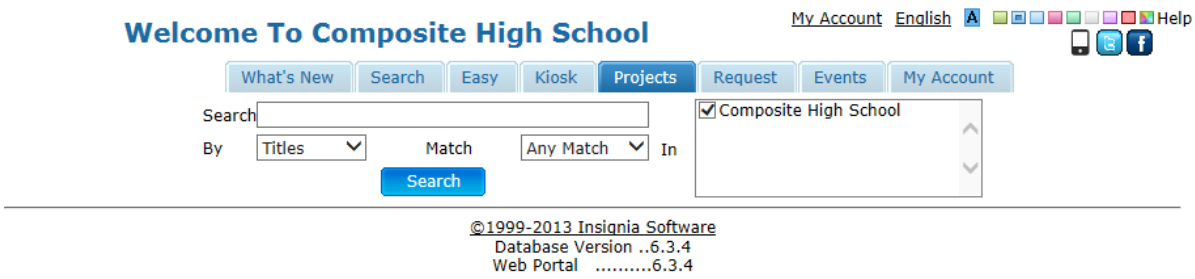
Clone

1. Log in as Admin All (district admin).
2. Click **Administration > Library Setting > Clone Parameters**.
3. Select the library name to copy from.
4. Select the tab that corresponds to the parameter that is to be cloned.
5. Select from the left hand side the clone group, settings, or category by checking the checkbox.
6. Select the libraries that the group, settings, or category will copy to on the right hand side by selecting the checkbox.
7. Click Clone.
8. Repeat steps 3-7 until all groups, settings, or categories are cloned.
9. Click Close.



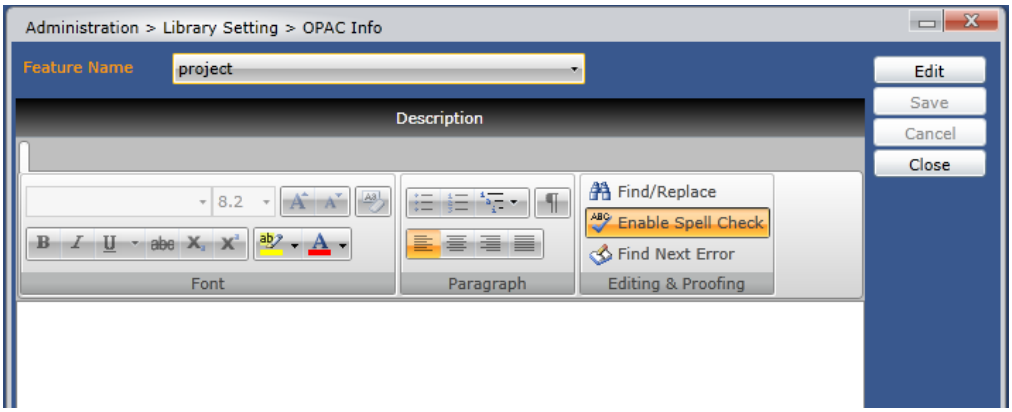
OPAC Info

Instructions may be provided on various OPAC screens such as the Easy, Kids, Projects, and Events screens. The OPAC Info enables users to customize the instructions provided on the OPAC. An example of the placement of the instructional text appears directly below:



1. Log in as Admin (district administrator).

2. Click **Administration > Library Setting > OPAC Info**.
3. Select the feature name from the drop down (i.e. Easy is selected below).
4. Click Edit.
5. Enter the information you would like to appear on the OPAC feature.
6. Click Save.



Z39.50 Host

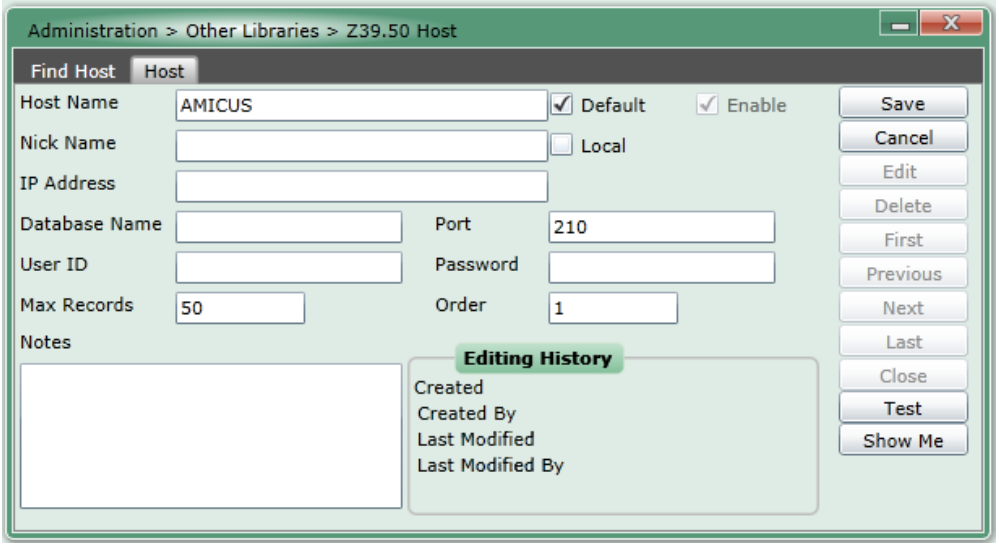
ILS has seamlessly integrated interface that searches any library that is Z39.50 compliant. ILS comes with predefined libraries that are Z39.50 compliant. Additional libraries can be added to this list. Technically, there is no limit to the number of libraries that can be searched, but the more libraries that are selected to search, the more time it will take for the results to be returned.

Information required to add a Z39.50 Host

1. IP address (or URL in IP address field)
2. Port number
3. Database name
4. User ID and password (if required)
5. Maximum Number of Records to Return (Max Records)
6. Order in which to search Z39.50 Hosts (Order). If results are found, the search will stop on that host and will not move to the next Z39.50 Host on the list.

New

1. Click **Administration > Other Libraries > Z39.50 Hosts**.
2. Click New.
3. Enter the information required.
4. Enabled means show the Z39.50 server on the list.
5. Default denotes that it automatically appears pre-selected in the list.
6. Click Save.
7. Click Test to see connectivity to the host.



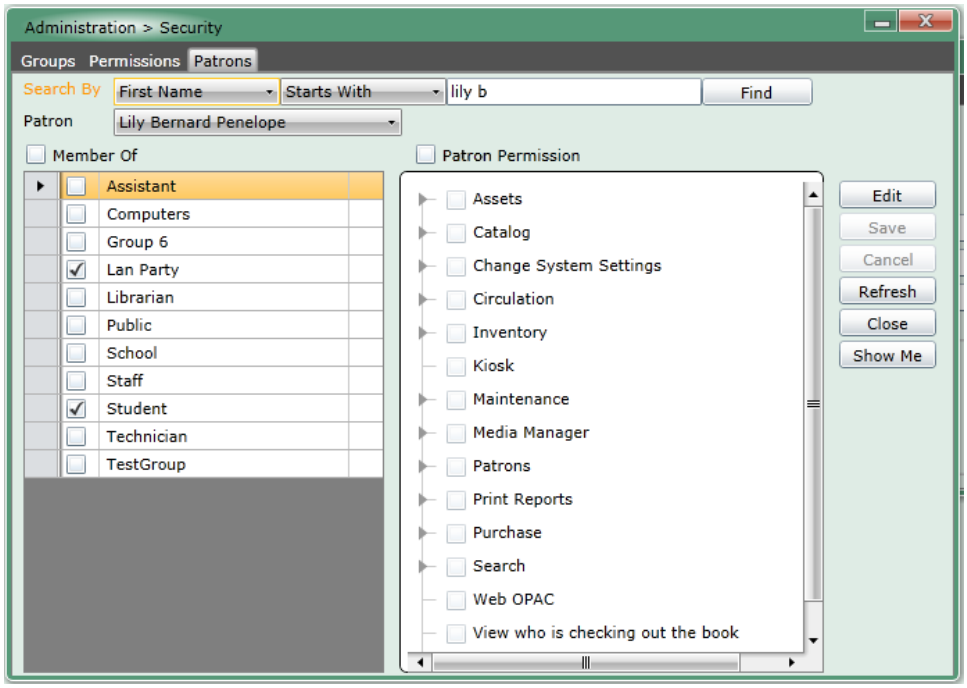
Security

Security permissions can be set up from the patron window or they can be set up from security. Descriptions for all of these permissions are written below each patron permission category. ILS enables permissions to be assigned to groups. Patrons can be added to these groups and the group permissions will automatically apply. This makes maintenance simple and is the recommended method for assigning permissions.

Patrons

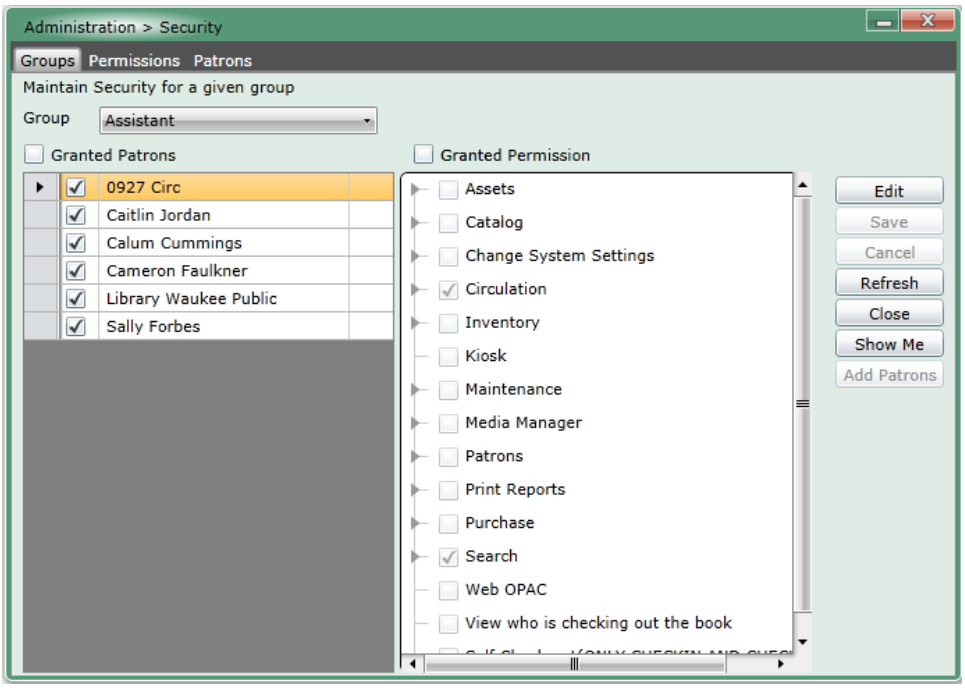
Patrons can be assigned permissions individually using this tab. However, this approach is not recommended and should be used as an exception rather than as a standard practice.

1. Click **Administration > Security**.
2. Select Patrons tab.
3. Enter the search criteria for patron.
4. Select patrons from dropdown.
5. Click Edit.
6. Select the permissions.
7. Click Save.



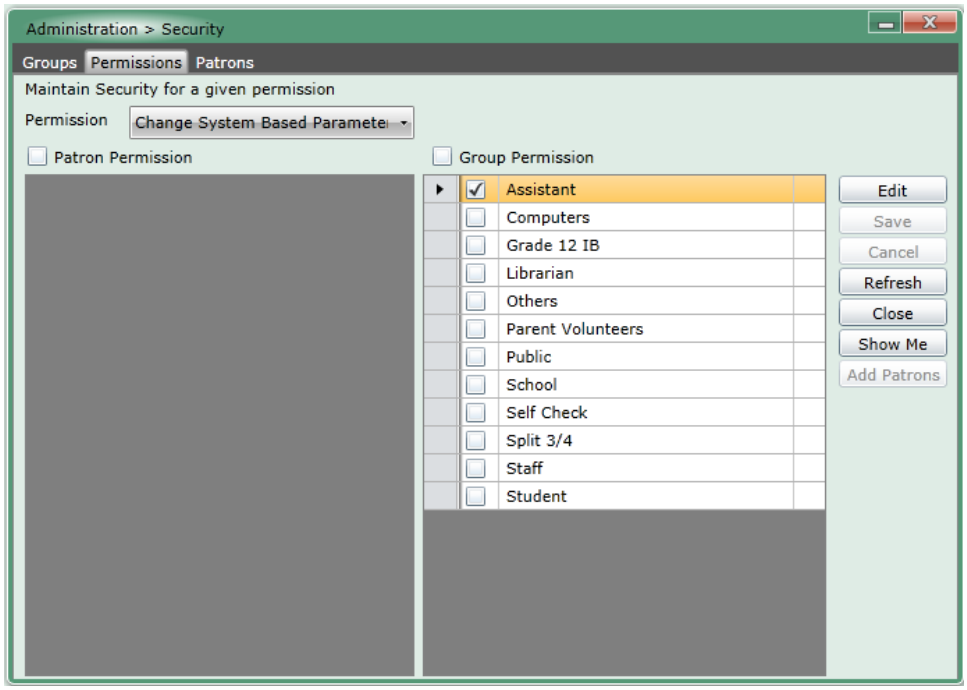
Groups

1. Click **Administration > Security**.
2. Select the Groups tab.
3. Select the group from the dropdown list.
4. Click Edit.
5. Select the permissions.
6. Click Add Patrons.
7. Specify the search criteria for patrons.
8. Click Find.
9. Select all the patrons who belong to the group by checking the box beside the patron's name.
10. Click OK.
11. Click Save.



Permissions

1. Click **Administration > Security**.
2. Click Permissions tab.
3. Select permissions from dropdown.
   - 3.1. Patrons can be assigned with all of the permissions of an admin user by clicking “Change System Based Parameters”.
   - 3.2. Patrons can be assigned with permissions to change the call no in the copy record separately from their permission to add the copy record.
   - 3.3. Alerts can be assigned by permission so they will only show up if the user has the eight security settings.
4. Click Edit.
5. Select the Patron Group.
6. To grant this permission to individual patrons, click Add Patrons.
7. Specify the search criteria for patron and click Find.
8. Select the patrons
9. Click OK.
10. Click Save.


Administration > Security
Groups
Permissions
Patrons
Maintain Security for a given permission
Permission
Change System Based Parameter
Patron Permission
Group Permission
Assistant
Computers
Grade 12 IB
Librarian
Others
Parent Volunteers
Public
School
Self Check
Split 3/4
Staff
Student
Edit
Save
Cancel
Refresh
Close
Show Me
Add Patrons

Global Changes

Insignia Library System provides the ability to make global changes to change or clean up data in the program. The list of global changes provided to the user enables changes to various sections of the program, such as patron updates, material changes, and circulation updates. Each selection will change the Criteria section of the screen with the limiting criteria to complete. There are three sections of Global Change available:

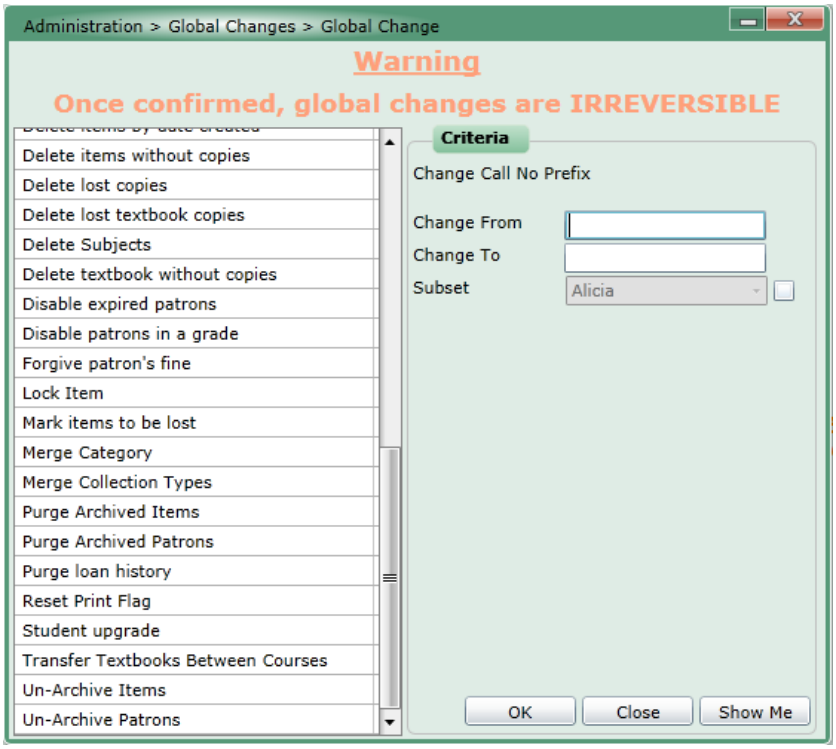
1. System Defined Global Changes
2. User Defined Changes
3. MARC Item Type Changes

Important: Global Changes cannot be reversed. Please contact insignia technical support if you have any questions about Global Changes.

System Defined Global Changes

The System defined global changes window provides a list of predefined global changes that Insignia has created based on popular use.

1. Click **Administration > Global Changes > System Defined Global Changes**.
2. Select the appropriate global change.
3. Define the limiting criteria on the right hand side of the window. This can include copy subsets that change copy information.
4. Click OK.
5. The system provides a prompt listing the amount of records that will be affected. If this prompt is correct, click OK and if not, click Cancel.



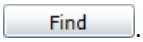
Criteria and New Values

Change Call No Prefix: Change call number prefix, the first call number box in basic info, to a different value. Changes can be made from a specific prefix number, a subset, or both.
Change Collection Type: Specify a call number range, created from and to dates, collection types, and subsets to change to another collection type.
Change copy location: Change copy locations from one location to another, or group copies that require location changes together in a subset to perform the change.
Change due date: Search for due dates changes to copies, temporary items, or textbooks. Select the title, patron barcode who has materials on loan, patron group, due date range, Class teacher, class, patron circ type, homeroom, period, or grade. Select the new due date for materials.
Change Homeroom: Change homerooms from one location to another, or group homerooms that require changes together in a subset to perform the change.
Change item circ type: Change one item circ type to another, or group item circ type changes into a subset or copy subset.
Change patron circ type: Change one patron circ type to another, or group patron circ type changes into a subset.
Change patron group: Change from one patron group to another, or use a subset to organize changes to multiple patron groups to one new one.
Change patron's expiry date: Change a patron's expire date to a specific calendar date. Use the following organizing criteria: patron group, homeroom, and patron subset.
Change patron's grade: Change the patron's grade to another grade, or change patron grades from multiple grades organized in a subset.
Copy Copy Call # to Item Call #: Select a call number range, a created from and to range, and a subset for copying copy call numbers to item call numbers.
Delete all the patron by card expiration date: Select a date range for card expiry or a subset of patrons to delete patron profiles.
Delete all the patrons by circ type: Select a date range for card expiry or a subset of patrons to delete patron profiles.
Delete all the patrons by graduation year: Delete patrons by the graduation year by either selecting a date range for graduating patrons or a patron subset.
Delete all the patrons by patron status: Delete the patrons by patron status or subset.
Delete all the patrons in a grade: Delete all patrons in a grade, or in a patron subset.
Delete all the patrons in a homeroom: Delete all patrons in a homeroom, or in a patron subset.
Delete book reviews by patron: Scan or type a patron barcode to whom the reviews are assigned.
Delete copies that are marked "To be Deleted": Select a date range or a subset of copies marked “To be Deleted” and delete them completely.
Delete events: Delete events which have expired before a specific date.
Delete inactive patrons: Delete inactive patrons from a specific date range and subset.
Delete items by call No: Delete call numbers within a specific call number range and subset.
Delete items by date created: Deleted items by the date created within a specific date range and subset.
Delete items without copies: Delete items with no copies created within a specific date range and subset. This feature can exclude eBooks, which will not have copies assigned.
Delete lost copies: Delete copies that have been lost between a specific date range and in a subset.
Delete lost textbook copies: Delete textbook copies lost within a certain date range.
Delete Subjects: Delete specific types of subject headings including Library Of Congress, Library of Congress for Children's Literature, Medical Subject Headings, National Agricultural Library subject authority file, Canadian Subject Headings, Repertoire de vedettes-matiere, Sour not specified, Source specified in subfield $2, and Item Subset.
Delete textbook without copies: Delete textbook titles without copies from a specific date range and exclude ETextbooks which have no copies.
Disable expired patrons: Disable all the patrons whose library cards have expired from a specific date range and patron subset.
Disable patrons in a grade: Disable all the patrons within a specific grade and patron subset.

Forgive a patron's fine: Forgive a patron's fine within a price range, date range, patron group, homeroom, class, fine type, patron subset, and specify by patron barcode and copy barcode. Select the checkbox "Total Fine" to include all of the fines for the patron(s) profiles.
Lock Item: Lock an item by selecting a specific subset and include previously locked items by clicking "Lock Item".
Mark items to be lost: Mark items to be lost from Library Books, Textbooks, an overdue date, patron group, and patron circ type.
Merge Category: Merge categories from textbooks from one category into another category.
Merge Collection Types: Merge collections types from one collection type into another collection type.
Purge Archived Items: Purge archived items by who archived it and a date range when it was archived.
Purge Archived Patrons: Purge archived patrons by who archived it and a date range when it was archived.
Purge loan history: Purge loan history from a specific time period or for a subset of patrons.
Reset Print Flag: This will remove any number of barcodes or spine labels on queue to print in the Barcode/Spine Label window when the checkbox “Changed Call #” is clicked.
Student upgrade: Move all of the patrons listed in grades up one grade. This is intended to move all of the students at once at the end of the school year.
Transfer Textbooks Between Courses: Transfer textbooks from one course to another course.
Un-Archive Items: Un-archive items archived by a specific user and from a specific archive date range.
Un-Archive Patrons: Un-archive patrons archived by a specific user and from a specific archive date range.

User Defined Global Changes

Global changes can also be made to user defined parameters. Data can be limited by Author, Budget, Call Number, Circulation Type, Copy Status, Created by, Item Barcode, Library Name, Local Call Number, Location, Note, Price, Replacement Cost, Subject, Subset, Target Audience, Title, and Vendor.

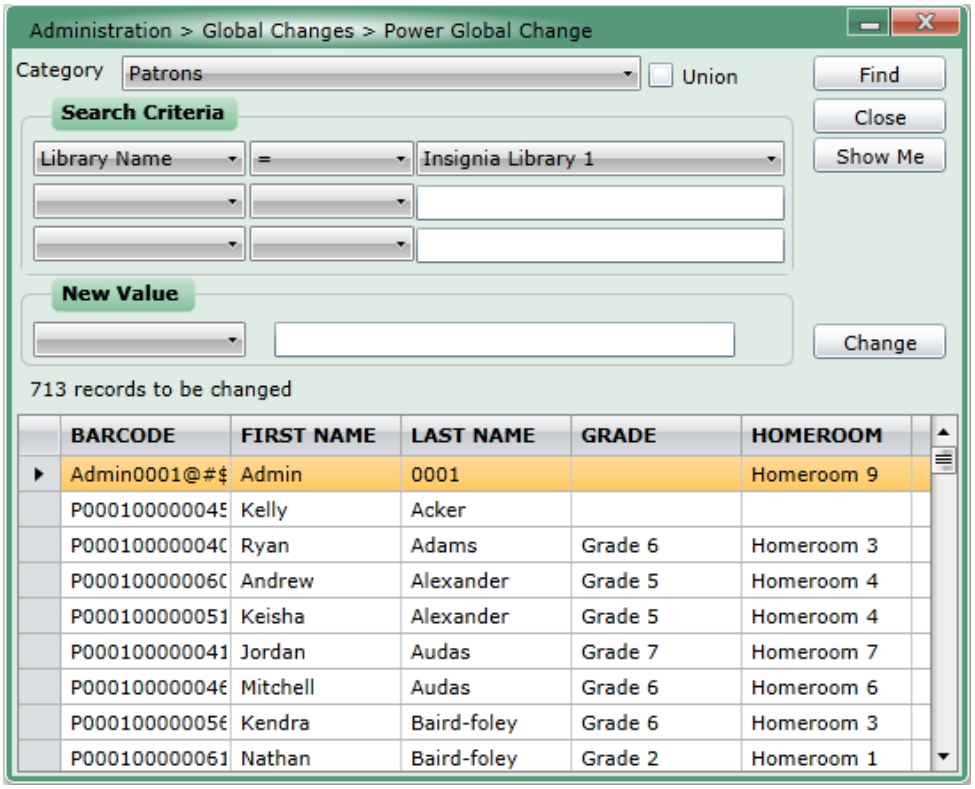
1. Click Administration > Global Changes > User Defined Global Changes.
2. Select the Category from the dropdown menu.
3. Select Search criteria and then click 

.
4. From the displayed search results choose the field to be modified by selecting an item from the New Value dropdown menu.
5. A New Value can be entered.
6. If it all looks correct, click

.

Criteria and New Values

Changes can be made to criteria within these three categories: Copies, Patrons, and Textbook Copies. The criteria that can be changed in each category are listed below:



Copies

Search Criteria: Author, Barcode, Budget, Call No, Circ Type, Copy Call No, Copy Status, Created By, Copy Subset, Created By, Date Inventory, Date Inventory Initialization, Library Name, Location, Note, Price, Replacement Cost, Subject, Subset, Target Audience, Title, Vendor

New Value: Budget, Circ Type, Copy Call No, Copy Status, Created By, Location, Price, Replacement Cost, Vendor

Patrons

Search Criteria: Barcode, City, Date Created, Expiry Date, First Name, Grade, Homeroom, Last Name, Patron Circ Type, Patron Group, Patron ID, Patron Status, Patron Subset.

New Value: Barcode, City, Date Created, Expiry Date, First Name, Grade, Homeroom, Last Name, Patron Circ Type, Patron Group, Patron ID, Patron Status.

Textbook Copy

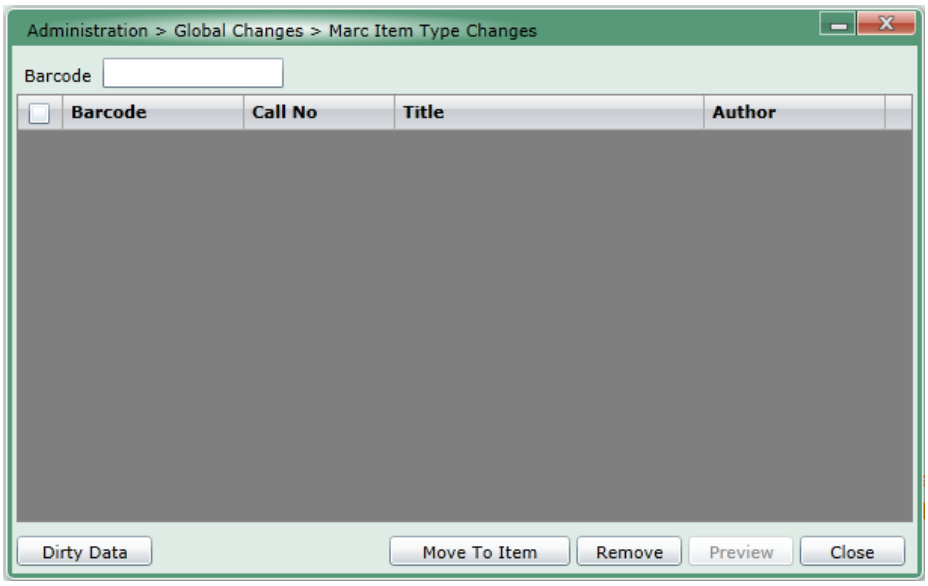
Search Criteria: Author, Barcode, Circ Type, Condition, Copy Loan Status, Title.

New Value: Circ Type, Condition, Copy Loan Status.

MARC Item Type Changes

Use this feature if items have been cataloged as serials and need to be moved to items.

1. Scan or type the barcode of the item that needs fixing.
2. Dirty Data fixes data from the item type in MARC records when they are imported from a previous library system.
3. Move To Item will relink the copy barcode to its item record.

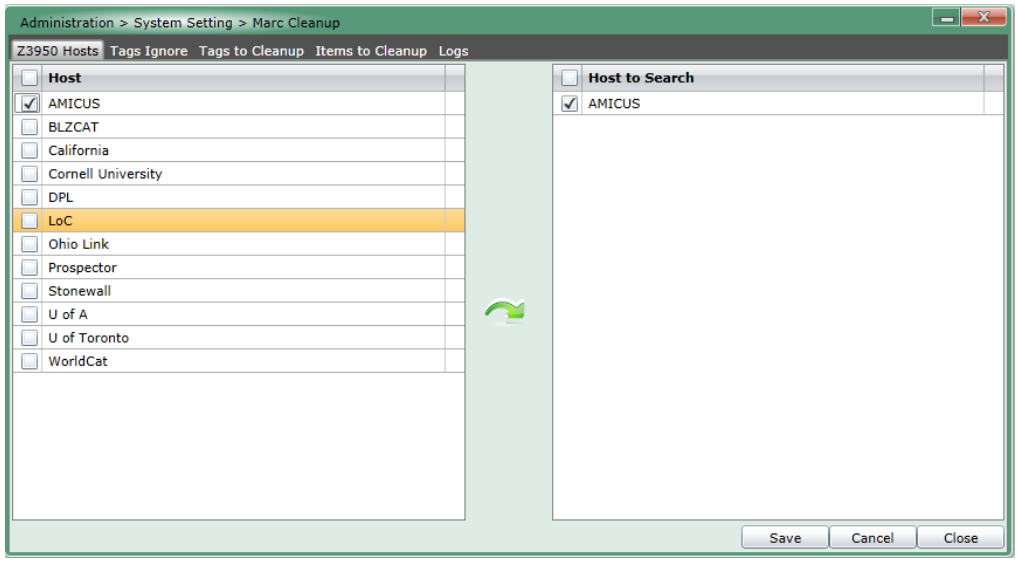


MARC Cleanup

This window provides the ability to fix up records by searching current records through Z39.50 and update for tags and subfields that have been selected. Please contact Insignia Support about this feature if needed.

Z39.50 Hosts

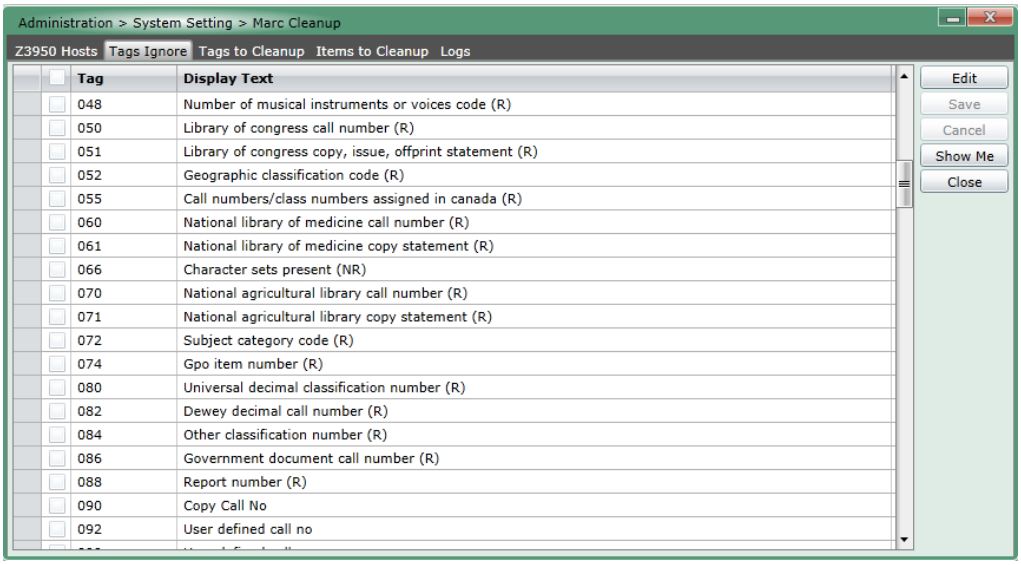
1. Click **Administration > System Setting > MARC Cleanup**.
2. Select Z39.50 Hosts.
3. Add them to the hosts to search box by clicking the green arrow.
4. Click Save.
5. Add the Tags Ignore, Tags to Cleanup, and Items to Cleanup using the tabs.



Tags Ignore

1. Click **Administration > System Setting > MARC Cleanup**.
2. Select Tags Ignore. Click Edit.

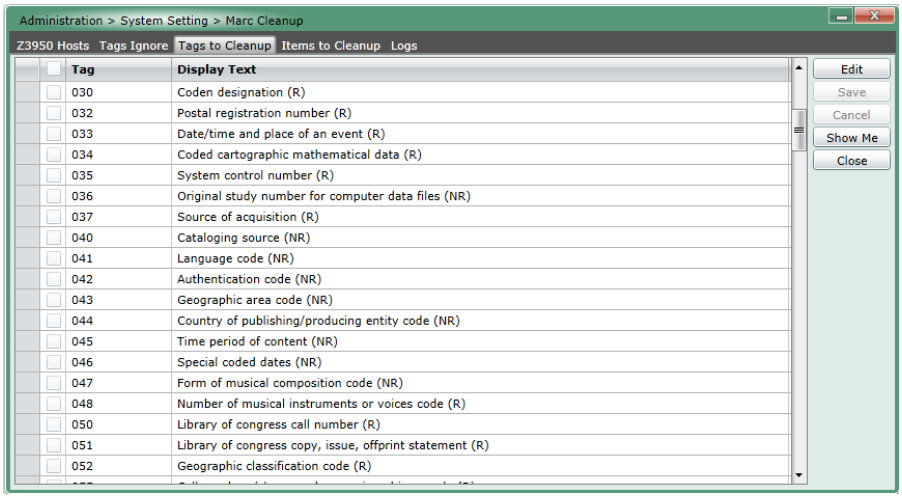
3. Click beside the tag number and click Save.


Administration > System Setting > Marc Cleanup
Z3950 Hosts
Tags Ignore
Tags to Cleanup
Items to Cleanup
Logs
Tag
Display Text
048 Number of musical instruments or voices code (R)
050 Library of congress call number (R)
051 Library of congress copy, issue, offprint statement (R)
052 Geographic classification code (R)
055 Call numbers/class numbers assigned in canada (R)
060 National library of medicine call number (R)
061 National library of medicine copy statement (R)
066 Character sets present (NR)
070 National agricultural library call number (R)
071 National agricultural library copy statement (R)
072 Subject category code (R)
074 Gpo item number (R)
080 Universal decimal classification number (R)
082 Dewey decimal call number (R)
084 Other classification number (R)
086 Government document call number (R)
088 Report number (R)
090 Copy Call No
092 User defined call no
Edit
Save
Cancel
Show Me
Close

Tags to Cleanup

Data cleaning refers to the process of finding and either correcting or removing parts of corrupt or inaccurate records from the database. They could be cause by entry errors, corruption in storage, and more factors. This window focuses on cleaning up MARC tags.

1. Click **Administration > System Setting > MARC Cleanup**.
2. Select Tags to Cleanup. Click Edit.
3. Click beside the tag number and click Save.

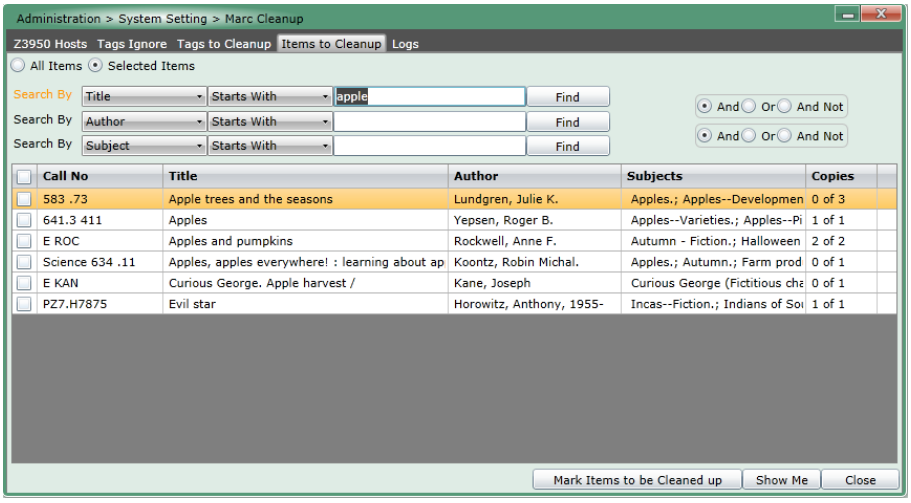

Administration > System Setting > Marc Cleanup
Z3950 Hosts
Tags Ignore
Tags to Cleanup
Items to Cleanup
Logs
Tag
Display Text
030 Coden designation (R)
032 Postal registration number (R)
033 Date/time and place of an event (R)
034 Coded cartographic mathematical data (R)
035 System control number (R)
036 Original study number for computer data files (NR)
037 Source of acquisition (R)
040 Cataloging source (NR)
041 Language code (NR)
042 Authentication code (NR)
043 Geographic area code (NR)
044 Country of publishing/producing entity code (NR)
045 Time period of content (NR)
046 Special coded dates (NR)
047 Form of musical composition code (NR)
048 Number of musical instruments or voices code (R)
050 Library of congress call number (R)
051 Library of congress copy, issue, offprint statement (R)
052 Geographic classification code (R)
Edit
Save
Cancel
Show Me
Close

Items to Cleanup

Data cleaning refers to the process of finding and either correcting or removing parts of corrupt or inaccurate records from the database. They could be cause by entry errors, corruption in storage, and more factors. This window focuses on cleaning up items.

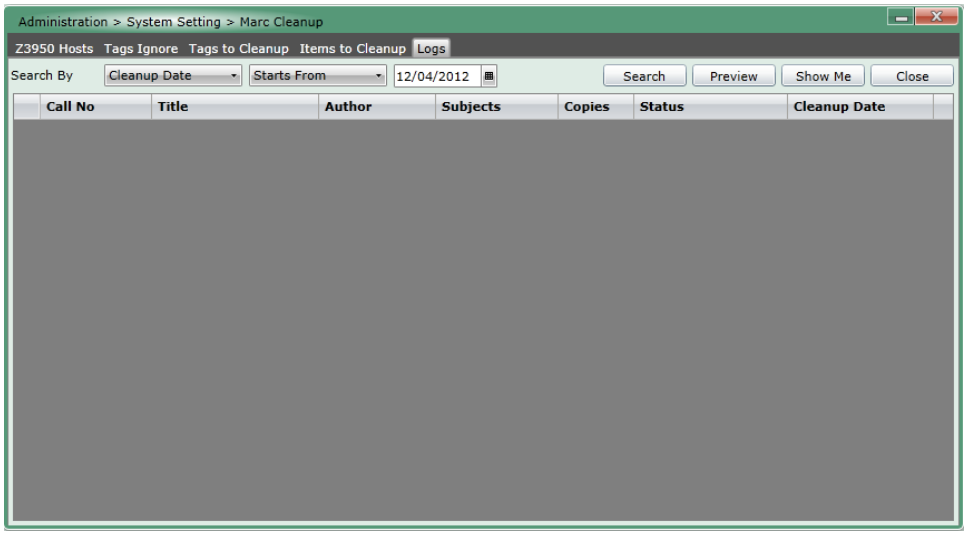
1. Click **Administration > System Setting > MARC Cleanup**.
2. Select Items to Cleanup.

3. If applicable, change the radio button from “Selected Items” to “All Items”.
4. Use the Search By criteria to look for items.
5. Select the checkbox beside the item record.
6. Click Mark Items to be Cleaned up.



Logs

1. Click **Administration > System Setting > MARC Cleanup**.
2. Select Logs.
3. Select the Search By dropdown to organize logs by Status or Cleanup Date.
4. Status includes Items to Clean, Successfully Cleaned, and Failed to Clean.
5. Click Search.



Notification

Insignia Library System has integrated features that can be used to notify patrons of overdue books, fines, and items on reserve. There are five tabs available in this window.

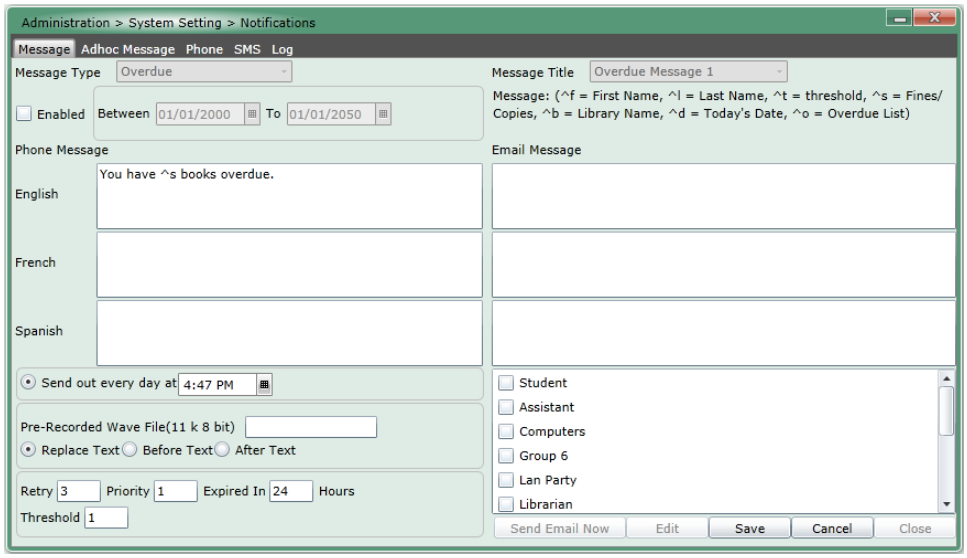
1. Message: Provides set up for autodialer messages and email messages. A set threshold must be met for messages to be sent.

2. Ad hoc Message: Provides the ability to send a message immediately by phone (the patron does not have to meet a threshold).
3. Phone: This tab provides the ability to change Autodialer phone settings.
4. SMS: List of carriers and gateways for sending SMS messages.
5. Log: Tracks Autodialer messages.

Message

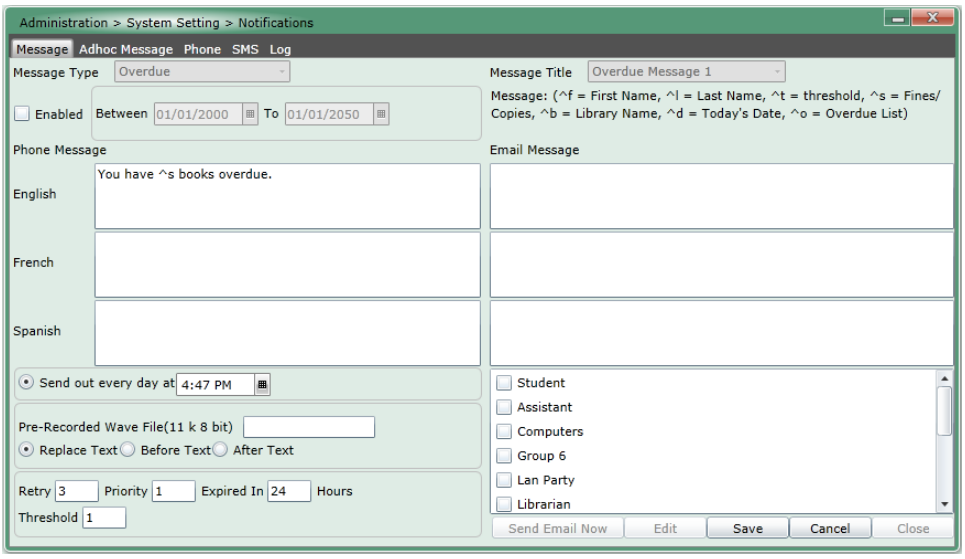
There are up to 5 different types of messages, including overdue, fine, and items on reserve messages available. The settings for the Autodialer appear on the left hand side of the Message window. To select the language to be used, click **Administration > Library Setting** and select the Miscellaneous tab.

1. Go to **Administration > System Setting > Notification**.
2. Click Edit.
3. Select a message type.
4. Specify the content for each language for phone system and email server.
5. The language and the group whom the message is to be sent can be specified.
6. The attempts made to contact the patron and the thresholds for initiating contact can be set.
7. Click Save.



The right hand side of the window displays information where notifications can be manually sent via email. This is an immediate process. This window sends emails only to selected patron groups (see **Patron > Patron** group to create a group). In order for an email to be sent, the threshold on the left hand side must be met.

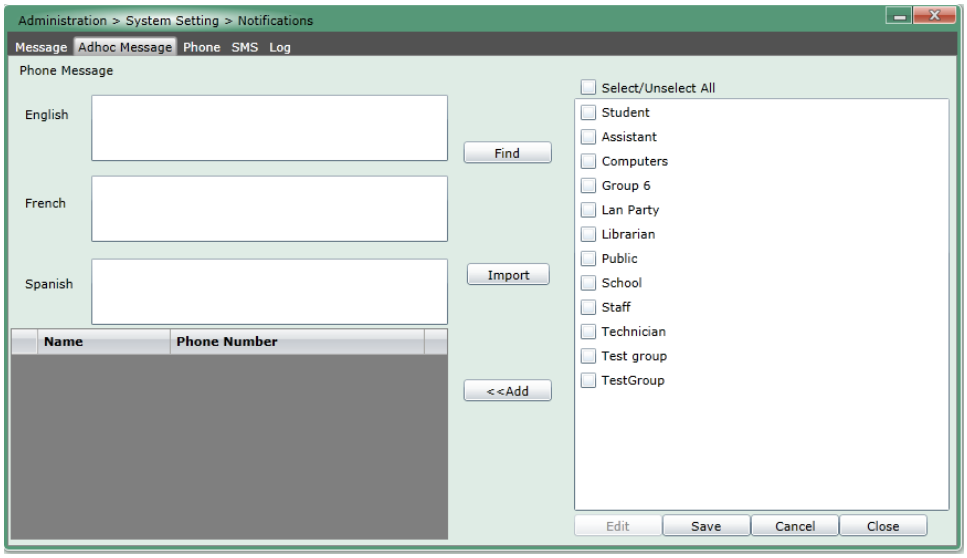
Email notifications can be set up to be automatically sent when a set threshold is reached. To set up automatic email notifications thresholds, follow **Administration > Library Setting** and select the Automation tab, pg. 174. To set up automatic system messages follow **Administration > Library Setting > System Message**, pg. 195.



Ad hoc Message

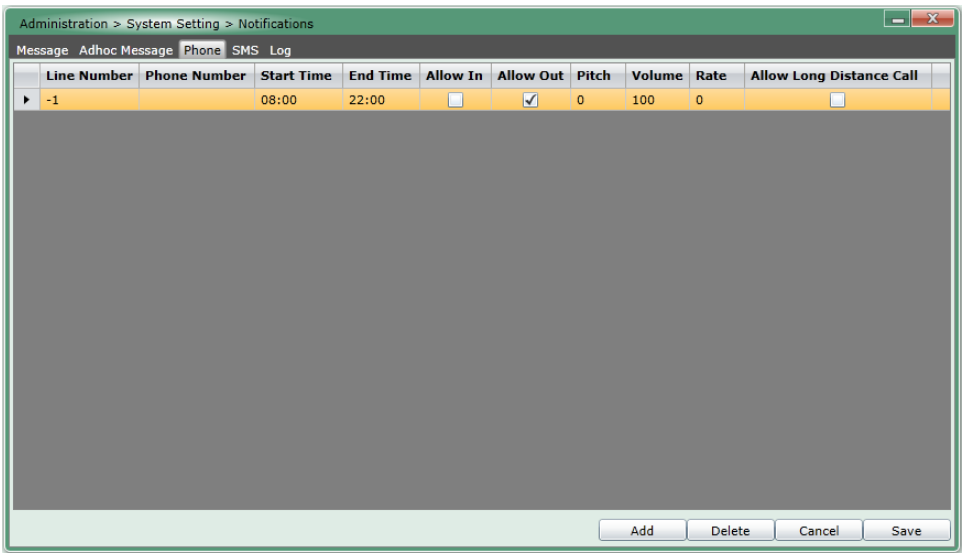
Ad hoc messages can be set without a threshold to cue them.

1. Click **Administration > System Setting > Notifications**.
2. Select the Ad hoc Message tab.
3. Click Edit.
4. Enter the message to be sent in the appropriate language field.
5. Click Find, Import, or Select a group to Add to the grid to be contacted.
6. Once this list is completed, click Save.
7. The contacts will now be contacted via phone with the message entered.



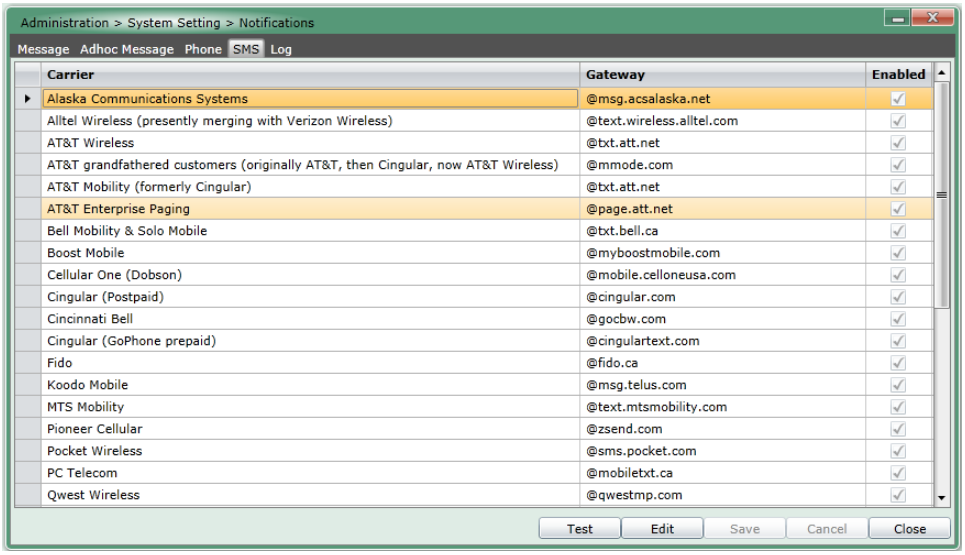
Phone

This phone tab enables phone lines to be set up with specific settings. The Autodialer calls can be limited to a specific time of day (Start Time and End Time). The phone line may be limited to outgoing calls. The pitch, volume, and rate of the messages may be selected and finally if long distance calls are enabled.



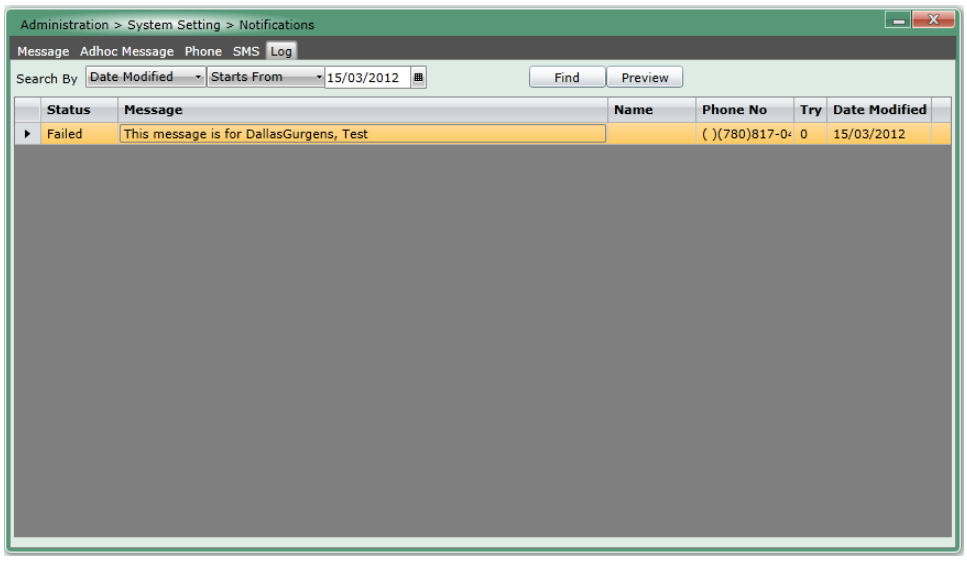
SMS

The SMS tab of the Notifications window lists the enabled carriers and gateways used for sending patrons SMS messages. Additionally, the carriers can be tested here.



Log

This tab of the notification window tracks Autodialer calls. These records can be searched by date modified and phone number.



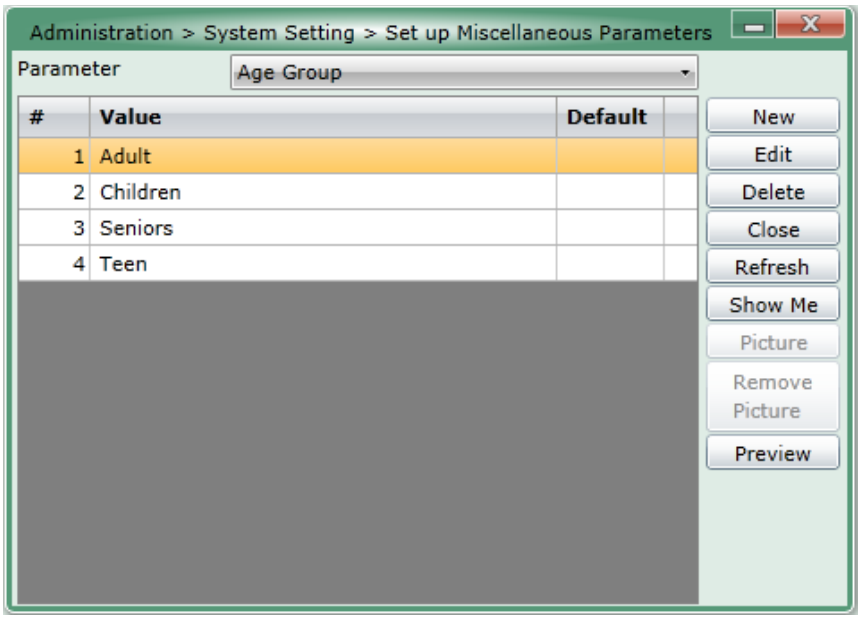
Parameters

Default parameters are used to set the default values which will automatically be displayed when adding a new record. The parameters are the options available in most of the systems drop down menus.

Example: If New York City is added as a default city, New York City will be automatically selected whenever a field for city is available.

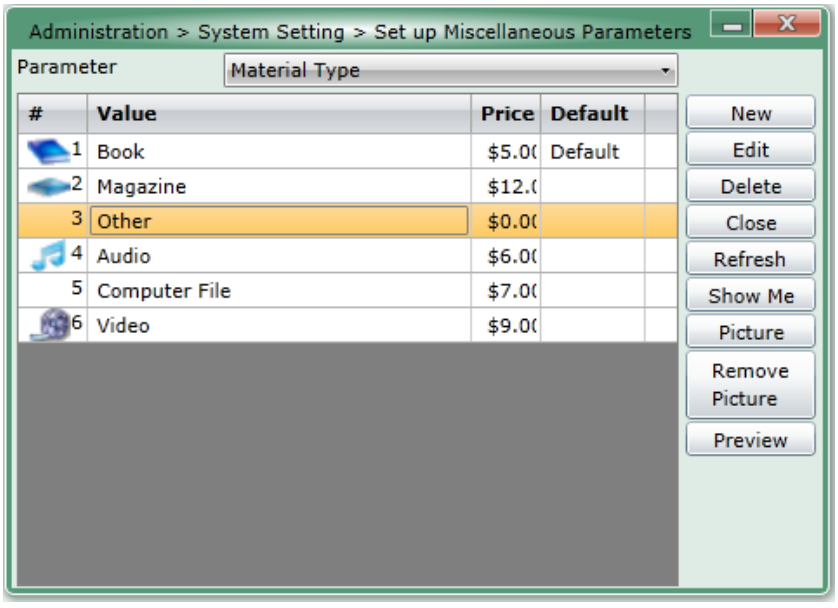
The following parameters have default options available:

1. Age Group
2. Audience
3. Category
4. City
5. Collection Type
6. Country
7. Department
8. Fine Type
9. Language
10. Library Type
11. Location
12. Material Type
13. Media Type
14. Notification Type
15. Place of Publication
16. Province/State
17. Tax Rate
18. Review Rate
19. School
20. Textbook material type



New

1. Click **Administration > System Settings > Parameters**.
2. Select the parameter to add to from the dropdown menu.
3. Click New.
4. Enter the value.
5. Select the Default checkbox if this value is to be the default.
6. Repeat steps 3-5 to add more values.
7. Click Save.



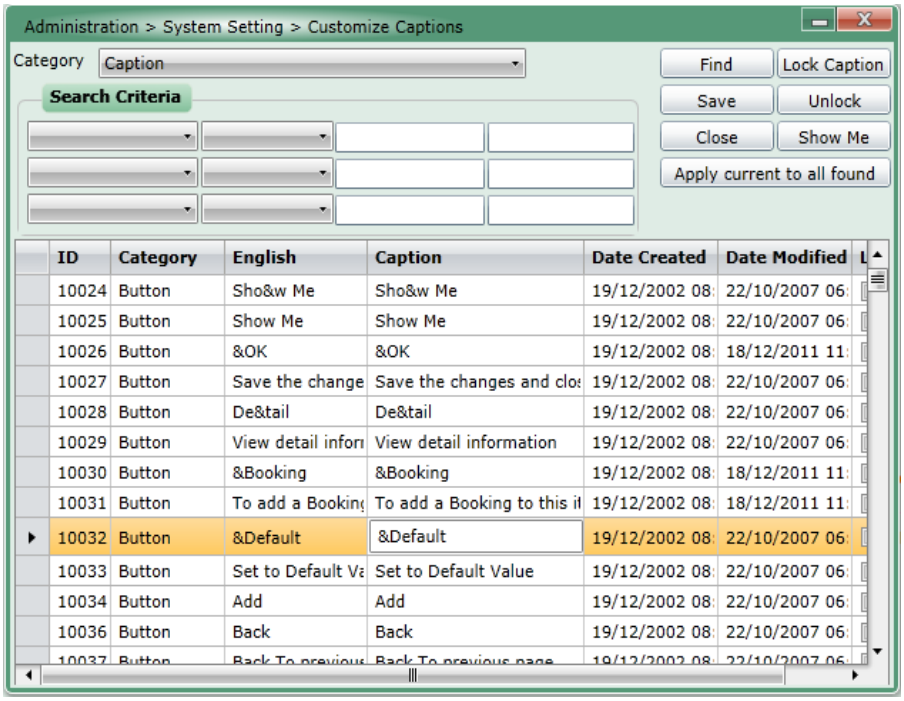
Picture

1. Click **Administration > System Setting > Parameters**.
2. Select Material Type from the dropdown list.
3. Highlight the material type to assign the picture too.

4. Click Picture.
5. Choose a picture from files.
6. Click Open.
7. Click Save.

Customize Captions

Captions, Qcards, and item type labels can be changed in the system. Captions are the words and terms used in the program. Qcards are boxes that appear when the cursor hovers over a field or button that displays a message or queues the user into the features application. Item types are the bibliographic formats that appear when cataloging. This feature allows captions to be customized to fulfill the needs of users. An example of a caption change is changing the word catalog to catalogue.


Administration > System Setting > Customize Captions
Category
Caption
Search Criteria
Find
Lock Caption
Save
Unlock
Close
Show Me
Apply current to all found
ID
Category
English
Caption
Date Created
Date Modified
10024 Button Sho&w Me Sho&w Me 19/12/2002 08 22/10/2007 06
10025 Button Show Me Show Me 19/12/2002 08 22/10/2007 06
10026 Button &OK &OK 19/12/2002 08 18/12/2011 11
10027 Button Save the change Save the changes and clo 19/12/2002 08 22/10/2007 06
10028 Button De&tail De&tail 19/12/2002 08 22/10/2007 06
10029 Button View detail infor View detail information 19/12/2002 08 22/10/2007 06
10030 Button &Booking &Booking 19/12/2002 08 18/12/2011 11
10031 Button To add a Booking To add a Booking to this i 19/12/2002 08 18/12/2011 11
10032 Button &Default &Default 19/12/2002 08 22/10/2007 06
10033 Button Set to Default Va Set to Default Value 19/12/2002 08 22/10/2007 06
10034 Button Add Add 19/12/2002 08 22/10/2007 06
10036 Button Back Back 19/12/2002 08 22/10/2007 06

1. Click **Administration > System Settings > Customize Caption**.
2. Choose Qcard, caption, or item type from the Category dropdown menu. Selecting the Search Category can modify and narrow the Search Criteria fields by selecting options linked to the Search Category.
3. Click Find.
4. Select caption to change from the list.
5. Double-click in the Caption field.
6. Type in the new phrase.
7. Click Save.

Federated Search

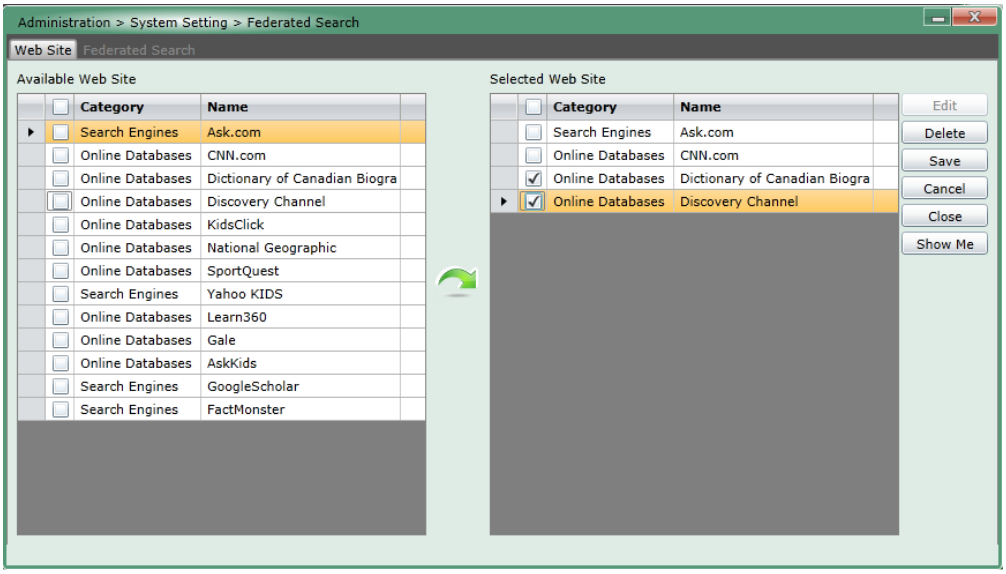
Use this window to select online databases displaying on the OPAC. Add additional databases not provided by contacting Insignia Support.

Add on the Right

1. Click **Administration > System Setting > Online databases**.
2. Click Edit.
3. Select the databases to add on the right.
4. Click Save.

Delete

1. Click **Administration > System Setting > Online databases**.
2. Click Edit.
3. Select the databases to delete.
4. Click Delete.

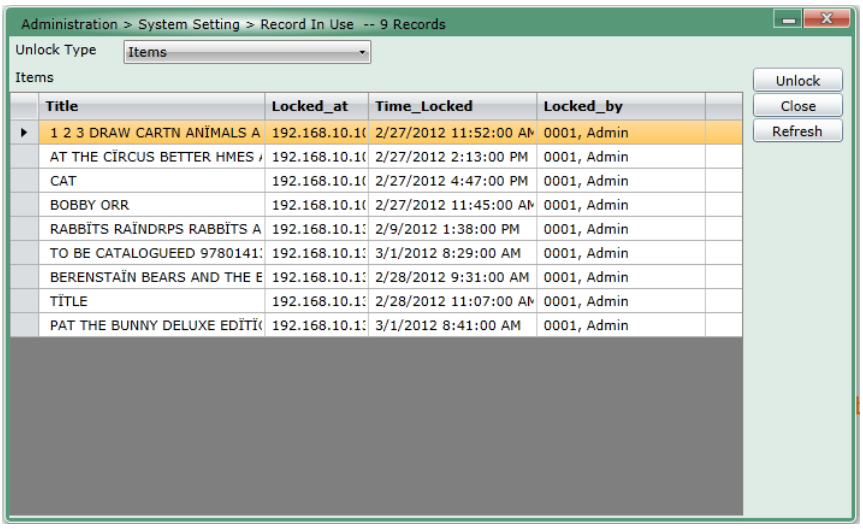


Locked Records

From time to time, records could become locked either by the system when the record is in use. If this happens please use this window to unlock these records.

Unlock

1. Click **Administration > System Setting > Locked Records**.
2. Select the locked item and then click Unlock.

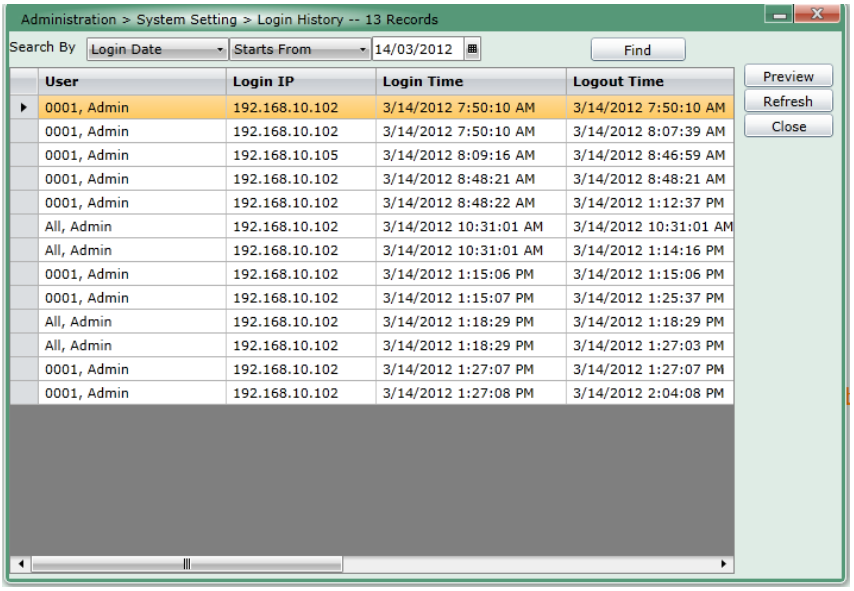

Administration > System Setting > Record In Use -- 9 Records
Unlock Type
Items
Items
Unlock
Close
Refresh
Title
Locked_at
Time_Locked
Locked_by
1 2 3 DRAW CARTN ANİMALS A 192.168.10.1(2/27/2012 11:52:00 AM 0001, Admin
AT THE CİRCUS BETTER HMES / 192.168.10.1(2/27/2012 2:13:00 PM 0001, Admin
CAT 192.168.10.1(2/27/2012 4:47:00 PM 0001, Admin
BOBBY ORR 192.168.10.1(2/27/2012 11:45:00 AM 0001, Admin
RABBİTS RAİNDRPS RABBİTS A 192.168.10.1: 2/9/2012 1:38:00 PM 0001, Admin
TO BE CATALOGUEED 9780141: 192.168.10.1: 3/1/2012 8:29:00 AM 0001, Admin
BERENSTAİN BEARS AND THE E 192.168.10.1: 2/28/2012 9:31:00 AM 0001, Admin
TİTLE 192.168.10.1: 2/28/2012 11:07:00 AM 0001, Admin
PAT THE BUNNY DELUXE EDİTİ(192.168.10.1: 3/1/2012 8:41:00 AM 0001, Admin

Invalid Suggestions

Use this feature to block inappropriate words from being entered and searched within the program. You can add, edit, and delete words from this list.

Login History

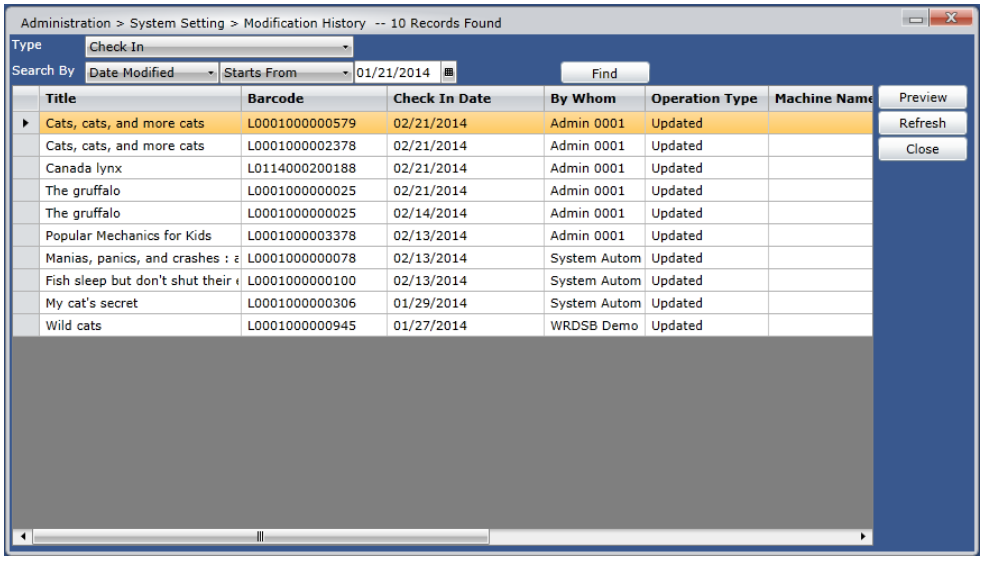
Use this window to track logins within a selected time frame. To access this window click **Administration > System Settings > Login History.**



Modification History

Use this window to track which user modified records in which module by going to the menu: **Administration > System Settings > Modification History.**

1. Select the Type of modification.
2. Select the Search By Criteria and click Find.


Administration > System Setting > Modification History -- 10 Records Found
Type
Check In
Search By
Date Modified
Starts From
01/21/2014
Find
Preview
Refresh
Close
Title
Barcode
Check In Date
By Whom
Operation Type
Machine Name
Cats, cats, and more cats L0001000000579 02/21/2014 Admin 0001 Updated
Cats, cats, and more cats L0001000002378 02/21/2014 Admin 0001 Updated
Canada lynx L0114000200188 02/21/2014 Admin 0001 Updated
The gruffalo L0001000000025 02/21/2014 Admin 0001 Updated
The gruffalo L0001000000025 02/14/2014 Admin 0001 Updated
Popular Mechanics for Kids L0001000003378 02/13/2014 Admin 0001 Updated
Manias, panics, and crashes : a L0001000000078 02/13/2014 System Autom Updated
Fish sleep but don't shut their L0001000000100 02/13/2014 System Autom Updated
My cat's secret L0001000000306 01/29/2014 System Autom Updated
Wild cats L0001000000945 01/27/2014 WRDSB Demo Updated

Import

Data can be imported for patrons and materials. Patron data can be imported from another system or added manually. MARC records can be imported from a MARC file.

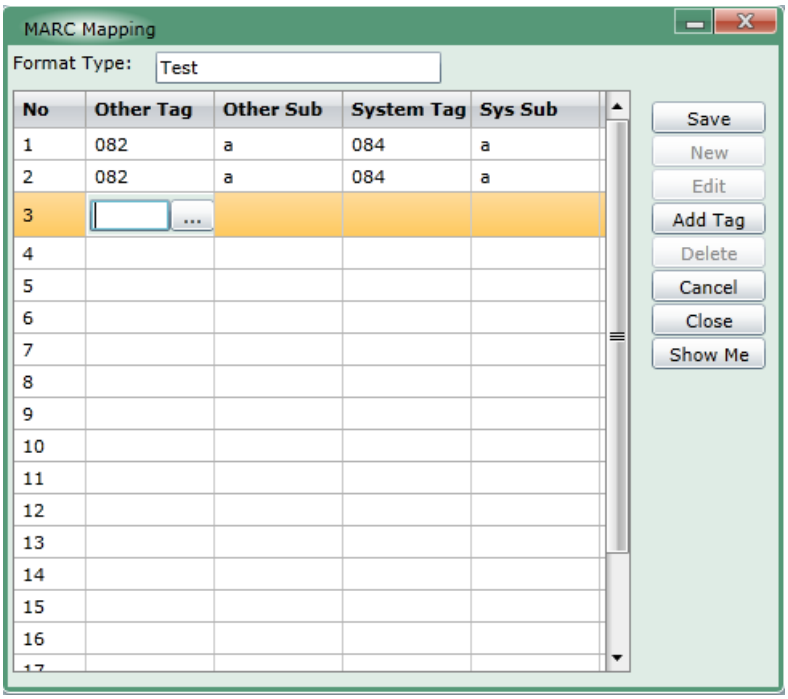
Import/Export Buttons

The following buttons can map information into the ILS or into an export file. Changes can be made on MARC tags and subfields, copy fields, and call number fields.

Mapping

Map MARC tags and subfields from their original position to a new position when importing or exporting MARC records from the system.

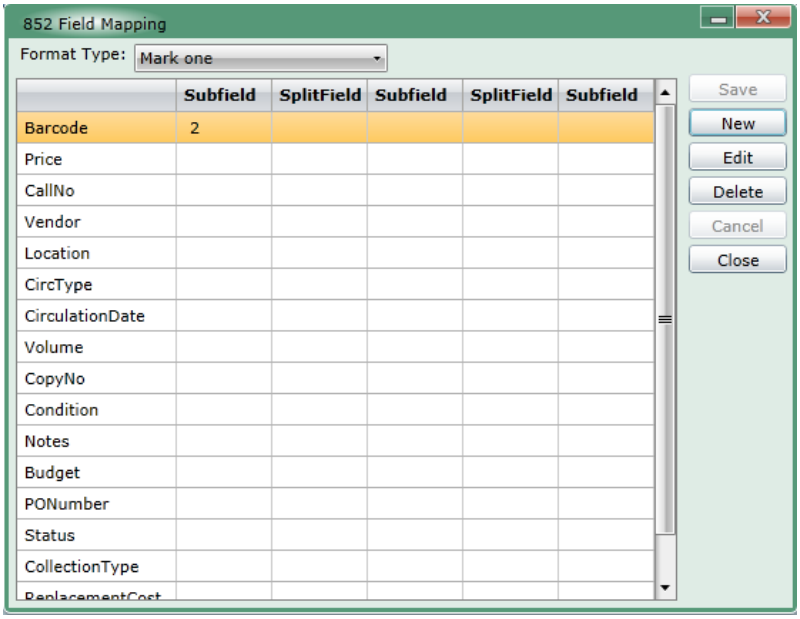
3. Select the row and click Add Tag.
4. Select the tag and its description and click OK.
5. The tag will appear in the “Other Tag” field.
6. Click the “Other Sub” field to see a dropdown. Select the subfield with its description
7. Repeat steps 1-4 to fill in the fields “System Tag” and “Sys Sub”.
8. The “Other Tag” and “Other Sub” will become replaced with the “System Tag” and “Sys Sub”.
9. Continue adding all of the MARC fields to be changed. When finished, click Save.



Copy Mapping

Copy mapping will take all of the fields in the import record, the 852 field, and change them to specific values when imported into the ILS.

1. Select the format type from the dropdown or click New to create a new format type.
2. Select the subfield from which the system will gather copy information.
3. Click Save.

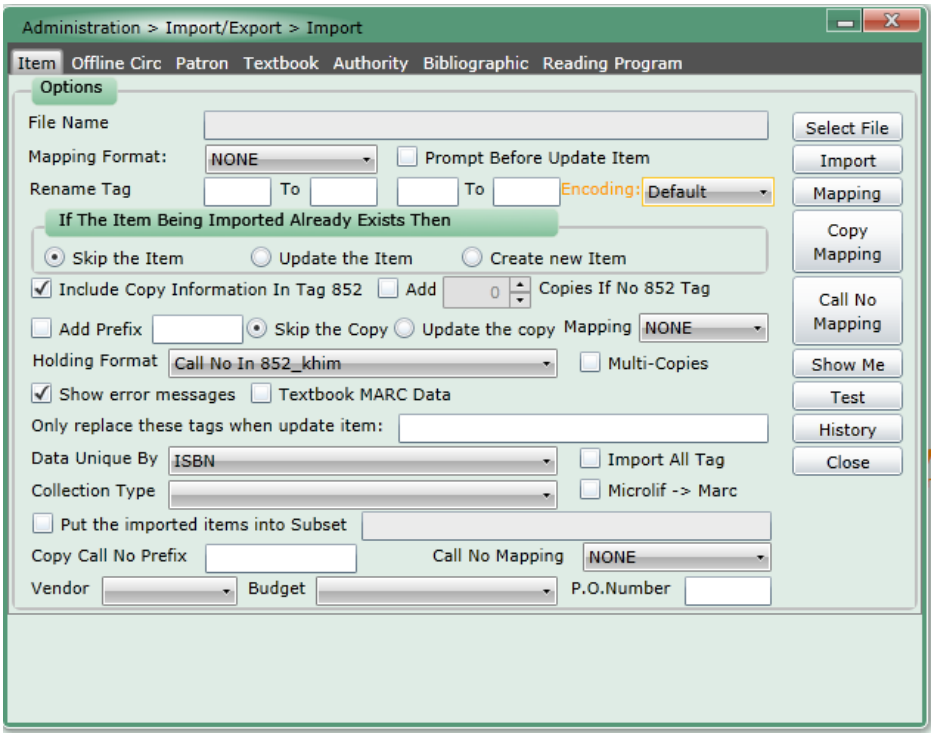


Call No Mapping

Please see Call No Mapping under the Catalog module.

Import Item

1. Click **Administration > Import/Export > Import**.
2. Select the Item tab.
3. Select the options for importing data.
4. Select the file to import.
5. Select settings.
6. Click Import.
7. A counter will appear displaying the number of items to be imported.



Import Options

Mapping Format

The format is selected after a Mapping from one tag to another tag has been setup as a format under Mapping.

Prompt Before Update Item

The ILS will prompt before updating any item records in the system with the imported file. This will become applicable if the radio button for *Update the Item* is selected.

Rename Tag

This is used if only one to two tags need to be renamed during import.

Encoding

Select the following encoding format to use when importing the file: Default, Arabic, or Unicode.

If the Item Being Imported Already Exists

Select from the following radio button options for **item records**:

1. *Skip the Item* will stop duplicate item records from being imported
2. *Update the Item* will update duplicate items with imported information

3. *Create New Item* will add an additional item if the record is a duplicate.

Select from the following radio button options for **copy records**:

1. *Skip the Copy* will stop duplicate copy records from being imported
2. *Update the Copy* will update duplicate copies with imported information.

Include Copy Information In Tag 852
Select the checkbox to import copy information.

Add x Copies if No 852 Tag
Select this checkbox to import a specified number of copies when no 852 tag is provided in the MARC record.

Add Prefix
This checkbox is selected to add a prefix onto the barcode, usually to create a centralized 14 digit barcode.

Mapping
This dropdown menu is used to select Copy Mapping Format after Copy Mapping has been completed.

Holding Format
This dropdown menu concatenate the subfields k, h, i, m.

Multicopies
Select multicopies to import multiple 852 tags.

Show Error Messages
Select to see error messages during import to find out more detail on why some records could not be imported.

Textbook MARC Data
Select this checkbox to import the data as a textbook.

Only replace these tags when update item
This box lists the tags in this field that will be updated.

Data Unique By
Select how the system will determine if the data is unique. If it is system defined, the system will first look at ISBNs, then title and author.

Import All Tag
The checkbox will override any mapping involving tags and subfields and will import every tag in every MARC file into the ILS.

Collection Type
If a collection type is selected in this drop down menu the imported records will be listed from this collection type.

Microlif - > MARC
Selecting this checkbox will convert Microlif files to MARC format.
Put the imported items into Subset: Selecting this checkbox will put imported items into a subset. Enter the name of the subset into the field to the right.

Copy Call No Prefix
Enter a call number prefix to add.

Call No Mapping
Add mapping for Call No if setup by clicking Call No Mapping.

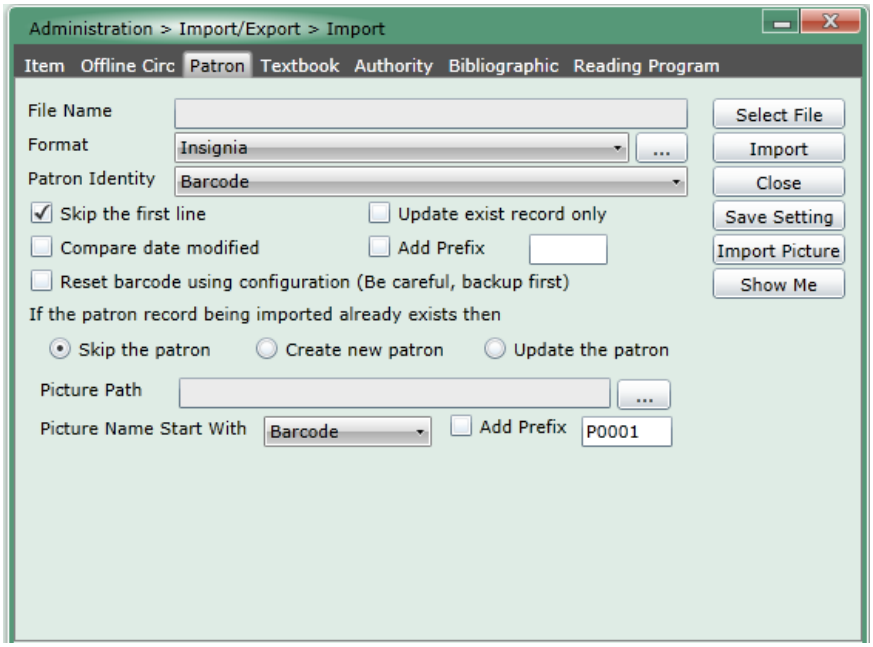
Vendor
If a vendor is selected in this drop down menu the imported records will be listed from this vendor.

Budget
If a budget is selected, it will be applied to the imported items.

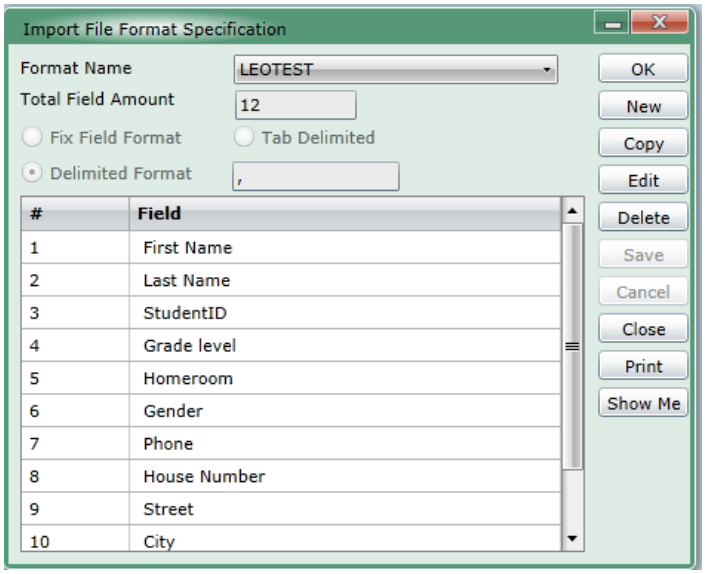
P.O. Number
If a P.O. Number is selected, it will be applied to the imported items.

Patron: Import

Patrons can become imported using the appropriate file format. Staff can import data from another system provided it is in ASCII format. A template that shows how the data was exported from the other system may be required. It is also possible to import pictures for patrons from this tab.



1. Click **Administration > Import/Export > Import**.
2. Select the Patron tab.
3. Click Select File to select the file for import.
4. Select the file format name. Customize the settings for the format by clicking ...
   - 4.1 Select New to add a new format title or select Edit to modify a format title.
   - 4.2 Set the Total Field Amount number.
   - 4.3 Select one of the following import formats: Fixed Field, Tab Delimited, or Delimited Format (specified with punctuation in the textbox).
   - 4.4 In the grid below, select a *Field* from the dropdown menu beside the order number (*#*). Order the fields according to the file being imported.
   - 4.5 Click Save and click Close.



5. *Skip the First Line* skips the header row in an import file, if one exists.
6. *Update Exist Record Only* will only update existing records and not import new patrons.
7. *Compare date modified* will compare a file's "Date Modified" column with the date modified in the database. If the database has the latest date, the import will skip the column.
8. *Add Prefix* will add a prefix to the patron barcode imported into the system.
9. *Reset barcode using configuration* will reset the barcode using the barcode feature in Configuration. Please make a backup file of the import before checking this box.
10. *Skip the patron* will skip duplicate patrons.
11. *Create new patron* will create new separate patron profiles for duplicate patrons.
12. *Update the patron* will update existing patrons and also import new patrons.
13. Click Import.
14. The Total Read, Total Imported, and Total updated will be indicated at the bottom of the import screen once the patron import has been completed.
15. If the patron file is not recognized, a prompt will appear. This indicates that the imported file is not in the format selected.
16. Check patron profiles in Excel (Excel will convert the file for user to view in column format based on the selection either fixed, tab, delimited) for the correct number of fields and that the field order is the same as the format created. Re-import once this is complete.

Patron: Import Picture

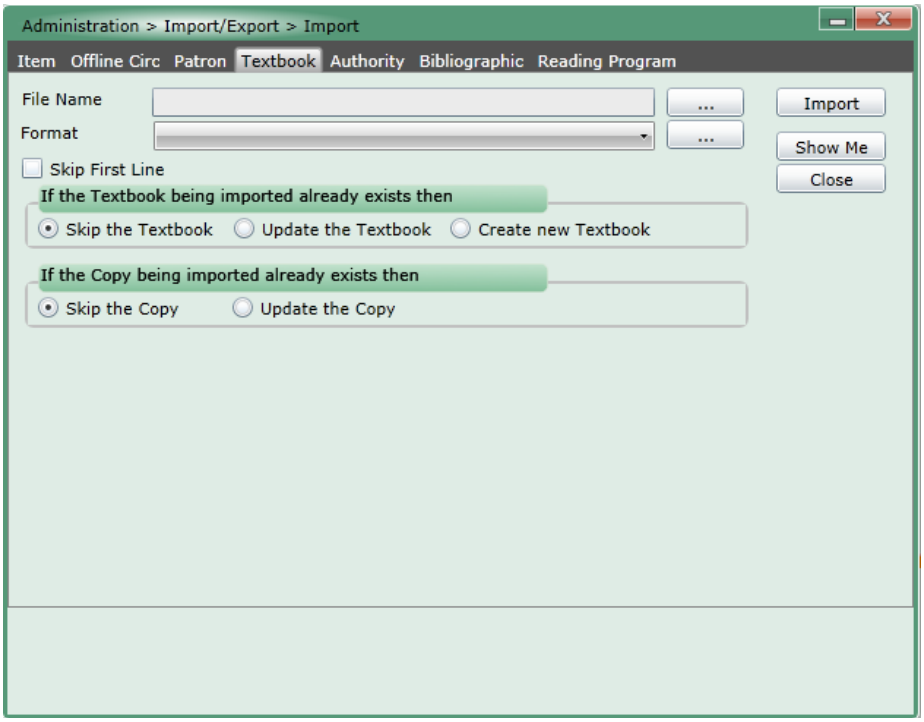
This feature will take patron photos from a zip file on the computer drive and import them into Insignia patron profiles.

1. Click **Administration > Import/Export > Import**. Select the Patron tab.
2. Click the ... to find the ZIP File with patron photos. The patron photos should be in the root of the zip file, not under any subfolders. Select the Barcode, PatronID, or StudentID in the patron profile as the filename for each patron photo.
3. Select the radio button to *Update The Patron*.
4. Select the Picture Name Start With to define the file name for each patron photo from the following list: *Barcode, Patron ID,* or *Student ID*.
5. Click Import Picture.

Textbook: Import

Importing textbook records from MARC file:

1. Click **Administration > Import/Export > Import**.
2. Select the Textbook tab.
3. Use [...] to find the file with MARC records in it.
4. Select the options for importing data including:
   4.1. If the Textbook being imported already exists then:
      4.1.1. Skip the Textbook: do not import that one textbook title
      4.1.2. Update the Textbook: change the textbook record in your system to the new record being imported.
      4.1.3. Create new Textbook: add a new, separate textbook record from the one already in the system.
   4.2. If the Copy being imported already exists then:
      4.2.1. Skip the copy: do not import the textbook holding already in the system.
      4.2.2. Update the copy: update the copy already in the system to the one being imported.
5. Click [Import].

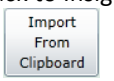


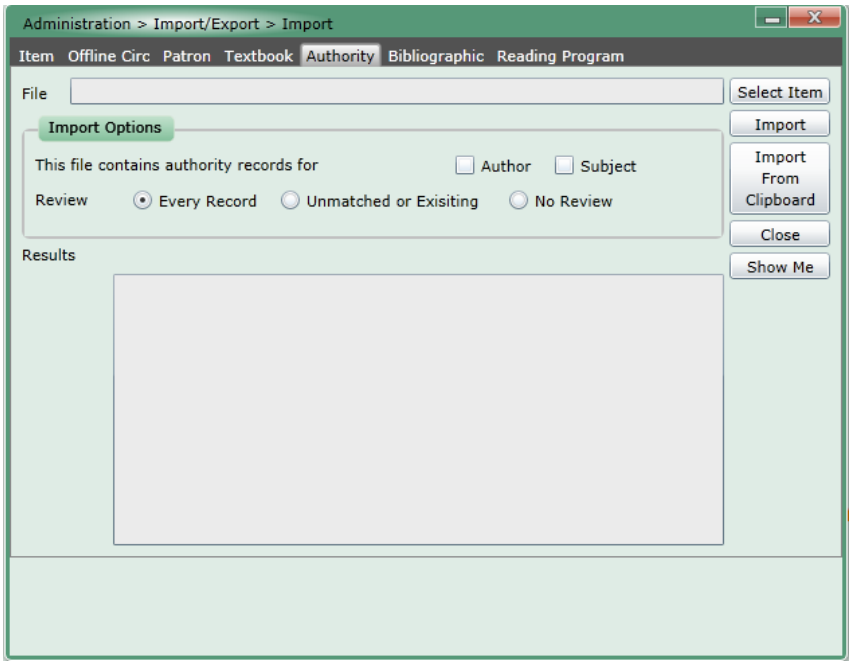
Authority: Import

1. Click **Administration > Import/Export > Import > Authority**.
2. Select the file to be imported and click Open.
3. Select the following import options:
   3.1 Specify if the file contains author or subject authority records.
   3.2 Select one of the following options for the system to review:
      3.2.1 Every Record: review all records before importing them into the system.
      3.2.2 Unmatched or Existing: only review records that do not match the authority files in the system.
      3.2.3 No Review: do not review any of the authority files that will be imported.
4. Click [Import].

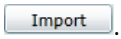
Authority: Import from Clipboard

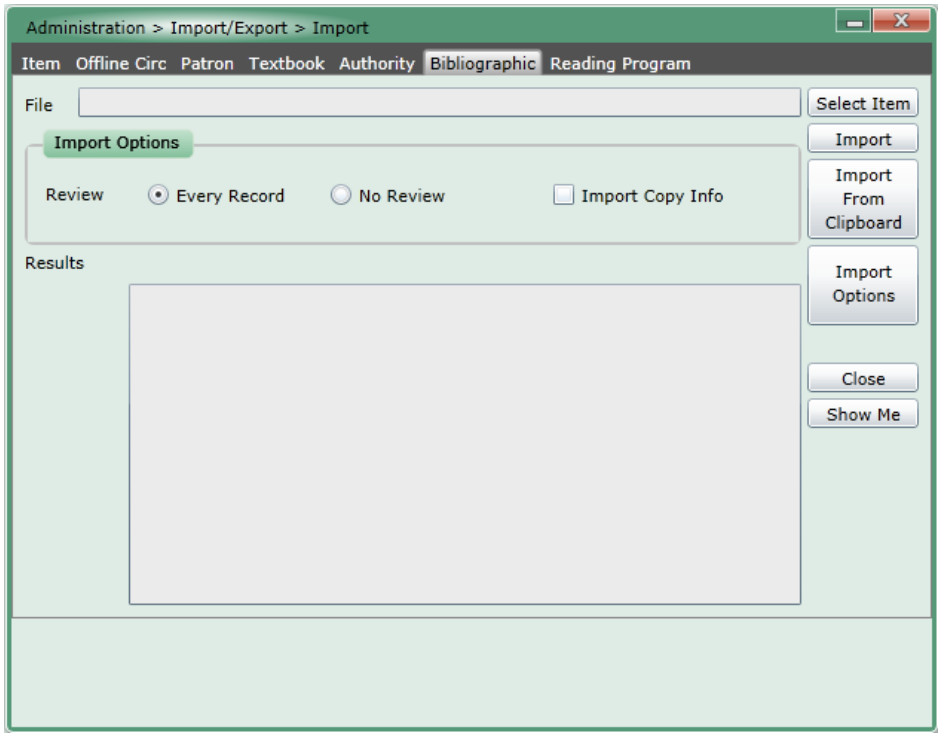
1. Click **Administration > Import/Export > Import > Authority**.
2. Using Internet Explorer, go to the web site that allows user to download MARC records.

3. On the web site, select the option that lets user save the MARC record.
4. Select the MARC code by pressing Ctrl + A to select the text; then press Ctrl + C to copy it to the Clipboard.
5. Go back to Insignia Library System.
6. Click 



Bibliographic: Import

1. Click **Administration > Import/Export > Import > Bibliographic**.
2. Click
.
3. Browse for the file and click Open.
4. Select the review options:
    4.1.1. Every Record: review all records before importing them into the system.
    4.1.2. No Review: do not review any of the authority files that will be imported.
5. Select the checkbox if you want to “Import Copy Info”
6. Click 
.



Bibliographic: Import from Clipboard

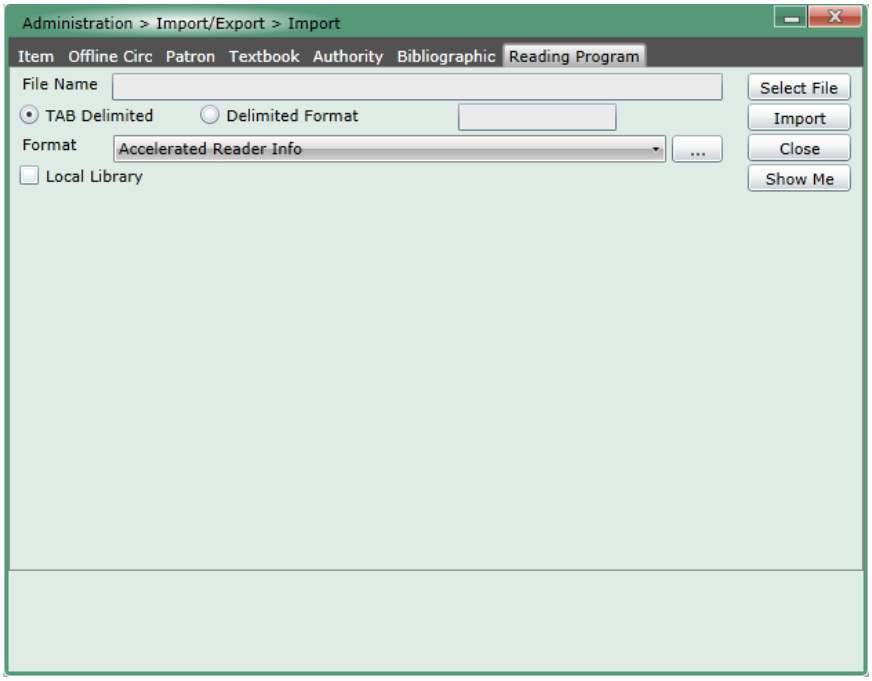
1. Click **Administration > Import/Export > Import > Bibliographic**.
2. Using Internet Explorer, go to the web site that allows user to download MARC records.
3. On the web site, select the option that lets user save the MARC record.
4. Select the MARC code by pressing Ctrl + A to select the text; then press Ctrl + C to copy it to the Clipboard.
5. Go back to Insignia Library System.
6. Click Import From Clipboard

Tip: If importing records that match items already in the database with a locked status, these locked items will not be updated. To update these items, remove the locked status for targeted items and then run the import.

Import Reading Programs

Reading program information can now be imported for a variety of reading programs

1. Click **Administration > Import/Export > Import**.
2. Select the Reading Program tab.
3. Use Select File to find the file with MARC records in it
4. Select the file format and click Open. If the format does not exist, call Insignia Technical Support.
5. Select the options for importing data including:
   5.1. If the file uses a TAB Delimited format
   5.2. If the file uses another Delimited format specified in the textbox.
   5.3. Select the Reading Program format in the dropdown. If it's not selectable, click ...
6. Click Import.



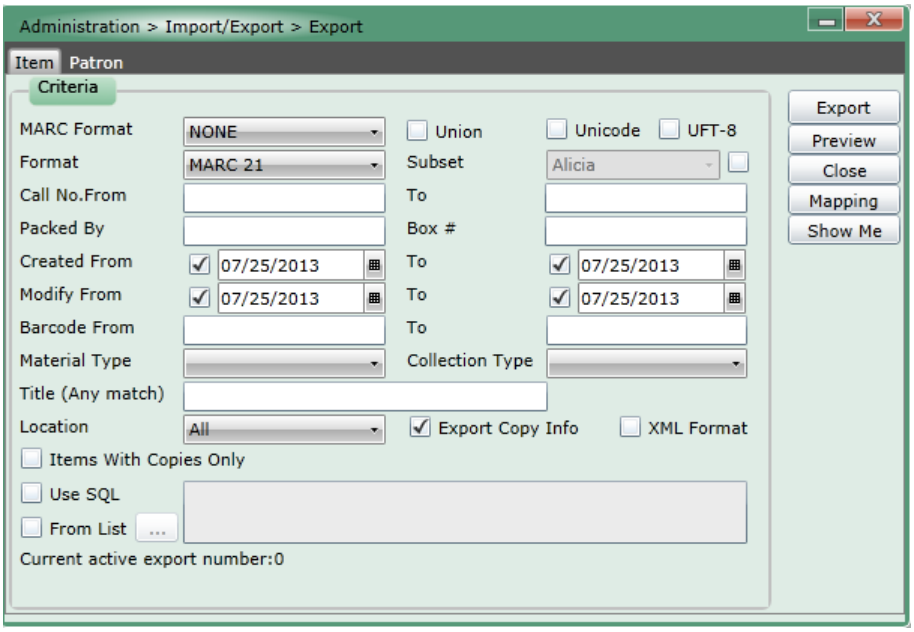
Export Data

Data related to items or patrons can be exported. Data exported for items is in MARC format and data exported for patrons in ASCII format.

Export Item

Exporting item information copies the specified MARC record(s) to a file.

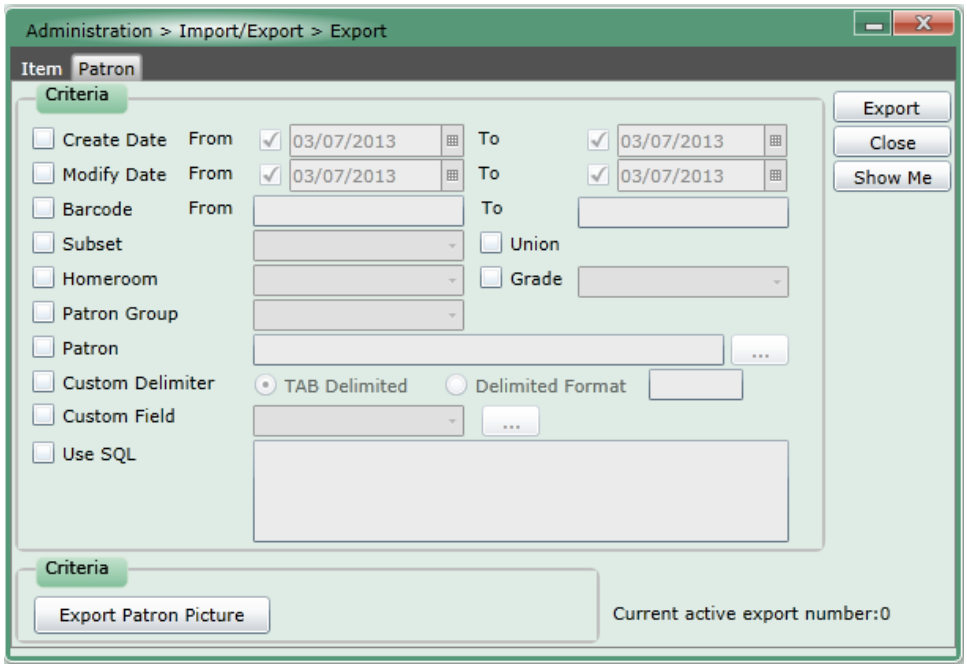
1. Click **Administration > Import/Export > Export.**
2. Select the Items tab.
3. Select the desired parameters. Please see the following explanations:
   - 3.1. Decide to export *Union* records or just one site.
   - 3.2. Export in *Unicode* by selecting Unicode.
   - 3.3. Export in *UFT-8* by selecting the checkbox.
   - 3.4. Input a *Call No* range.
   - 3.5. Add *Create by* (who packed the box of materials) and the *Box #*.
   - 3.6. Include *Created from and Modify from* date ranges.
   - 3.7. Include a *Barcode* range.
   - 3.8. Select a *Collection Type*: If a collection type is selected in this drop down menu the imported records will be listed from this collection type.
   - 3.9. Select a *Material Type*: If a material type is selected in this drop down menu the imported records will be listed from this material type.
   - 3.10. Input a specific *Title*.
   - 3.11. Input a *Location*.
   - 3.12. Decide whether or not to *Export Copy Info*.
   - 3.13. Export in *XML Format.*
   - 3.14. Export a list of barcodes using *From List*.
   - 3.15. Specify whether or not to export *Items With Copies Only*.
   - 3.16. Select a *Subset* to choose a group to export (created in Find/Add Item window).
4. Click Export.



Export Patron

Patron information can be exported in a variety of formats like Tab delimited or a custom Delimited Format. Patron pictures can also be exported.

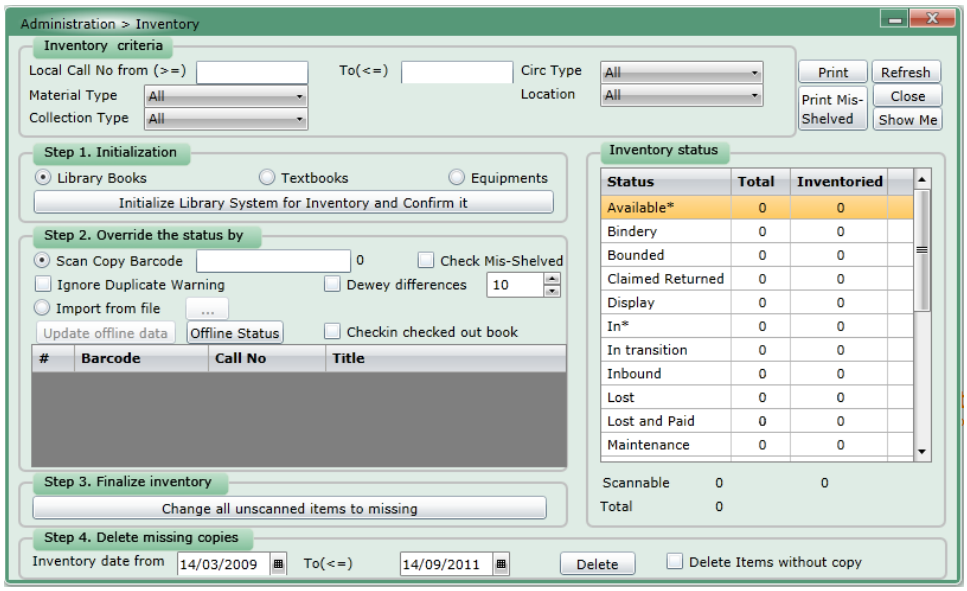
1. Click **Administration > Import/Export > Export**.
2. Select the Patron tab.
3. Select the desired parameters. They include search criteria from the Find/Add Patron window either from your local library or from the *Union*, including *Barcode, Subset, Homeroom, Grade, Patron Group*. They also include the following:
   3.1. *Create Date*: when the patron profiles were created
   3.2. *Modify Date*: when the patron profiles were modified
   3.3. *Patron:* search for an individual patron name
4. Choose the Custom Delimiter in the export file including the *TAB Delimited* or a custom *Delimited Format* identified in the following textbox.
5. Specify a *Custom field* labeled with its own specific format name.
6. *Use SQL*: Please contact Insignia Software if you would like to use this field in an export.
7. Click Export or Export Patron Picture .



Inventory

In ILS inventory is a 4 step process. The inventory process can be applied to the entire library or a part of it. Inventory may be completed over several days.

Items can be scanned directly into the Inventory screen by bringing the books to the computer or moving the computer around the shelves on a cart. The barcodes may also be scanned into a Notepad file with one barcode per line. The scanner should be setup with a carriage return which will drop the barcode to one barcode per line. The file is saved and then imported using the Import from File option. In this way, incoming records held in the import file are compared with the current shelf collection to discover unexpected lost copies.



Step 1. Initialization

This step will either prepare specific sections of records (by adding criteria) or all of your records (by selecting all from dropdown menus and leaving call number ranges blank) in your library for inventory.

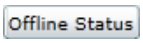
1. Click Administration > Inventory.
2. Choose to inventory the entire library or part of it (to do a partial inventory, enter the desired range of call numbers or specify a material type, collection type or a specific location).

Tip: Use Shelf List window under Catalog > Cataloging > Shelf List to help you block off call number ranges. Note the number of characters of the longest call number and include that length of characters in your call number range (i.e. 100.34 - 110.89 can become the range 100.00 to 110.99 in inventory).

3. Click the Initialize library system… button. The Initialization button **should only be clicked on once at the beginning of the inventory cycle each year** when doing the entire library or until the section is completed.
4. Please note any prompt that may arise if inventory has been previously initialized on the same section. Click "Yes" to continue conducting inventory on that section.
5. Enter a name that will appear in the Inventory Criteria dropdown when reopening Inventory.
6. Please note any prompt that describes the number of copies in your inventory range. This number should match the number of books that need to be scanned. The prompt will also remind you to also check your reserve shelf for copies included in your inventory.

Step 2. Scan Barcodes

This step contains multiple settings that will organize your barcodes scanned and create specific inventory statistics and pop-ups during your inventory process.

1. The Scan Copy Barcodes radio button will allow individual barcodes to scan into the system one at a time. Notepad files with multiple barcodes can also be imported by changing the radio button to Import From File.
2. Ignore Duplicate Warning will disable any pop-ups warning that a barcode has been scanned in twice. This situation may occur often in your inventory process and it does not impact the inventory statistics . If the pop-up is not useful to you, please feel free to use this checkbox.
3. The Update Offline Data button will allow barcodes scanned into inventory in Offline Circulation to become included in the inventory. Click 

to select a date range when inventory was conducted offline to be uploaded into your current inventory section.
4. To view the Mis-shelved items during the inventory process, select the checkbox for Check Mis-Shelved Items. The Dewey Differences textbox will also provide a specified number of spaces that a copy can be misplaced by to provide a more efficient check for copies that have been mis-shelved.
5. Copies checked in while performing inventory can have their status changed to "In" while performing inventory by clicking the checkbox Checkin Checked Out Book.
6. If user has finished for the day but has not completed section, click the Close button. The information will be saved.
7. Next day, press the Refresh button or select the inventory criteria name from the dropdown list. The information from the day before will appear on screen. **(Do not click Initialize button).**

Step 3. Finalize Inventory

This step will mark all copies not scanned to missing, unless they have been marked in another appropriate status indicating that the barcode could not be scanned in inventory. For example, items that are currently checked out do not need to be re-scanned.

1. To finalize the inventory process and change the status to Missing, click the Change all un-scanned items to Missing button.

2. A checklist of missing copies will appear. If a missing copy has been found from this list, deselect the checkmark beside the copy title and it will not be marked as missing. When finished, click Mark Missing.

Tip: Clicking Mark Missing will technically change copies already marked "Missing" back to "In". Missing Inventory reports with historical data may still contain titles checked back to "In" if they had previously been marked "Missing".

3. Once the inventory is complete, select Print Mis-Shelved to print a list of all the items that were Mis-shelved. User must select the Check Mis-Shelved button from the start of the inventory in order to retrieve a complete list.
4. Please view all of the copies marked missing by clicking Preview. This report will also provide inventory statistics at the bottom of the list.

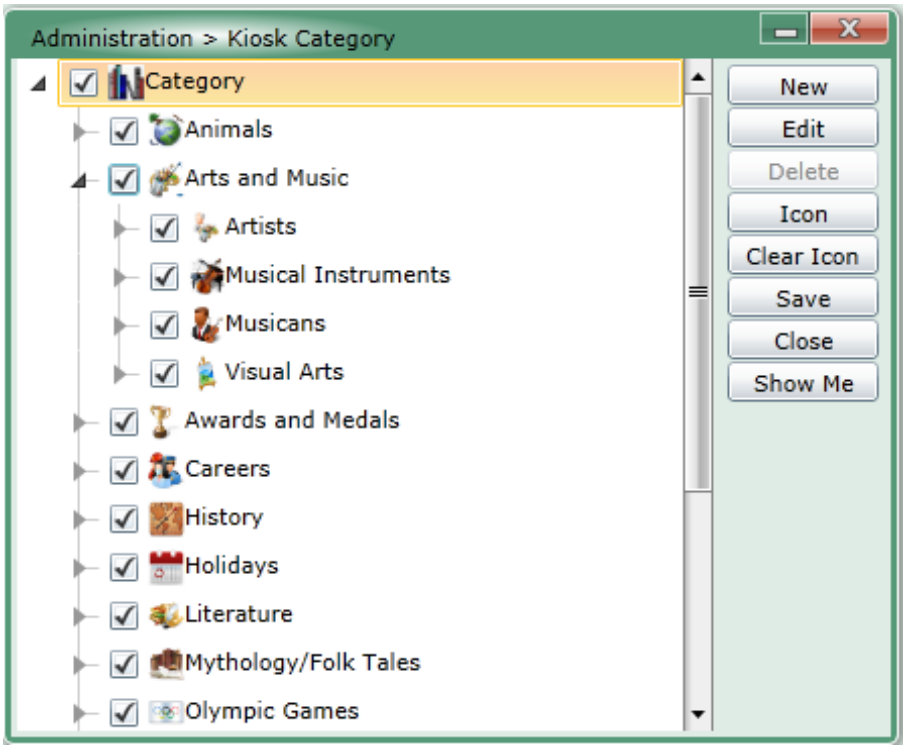
Step 4. Delete Missing Copies

Please note that this step can wait until two years after completing your inventory process to prevent deleted records of missing copies from being cataloged again if materials are found.

1. Choose a date range when inventory was completed where the system will delete copies.
2. Select the Delete Items Without Copies checkbox if item records also need to be deleted.
3. Click Delete.

Kiosk Categories

Insignia Library System allows the addition of new kiosk categories and deletion of existing ones. New pictures can be added to kiosk categories.



New

1. Click Administration > Kiosk Categories.

2. Deselect the checkbox to disable Kiosk Categories. Enable it by selecting the checkbox.
3. To add a subcategory, select the parent category.
4. Click New.
5. Type in the name of the new category.
6. To assign a picture.
7. Click Icon and select the file.
8. Click Save.

Password

It is a good idea to change your passwords regularly to maintain security. Try adding numbers and letters to the password to make it more secure. The number of attempts made on a login password before locking the profile is set up in **Administration > System Setting > Custom Setting** by the Administrator.

Change

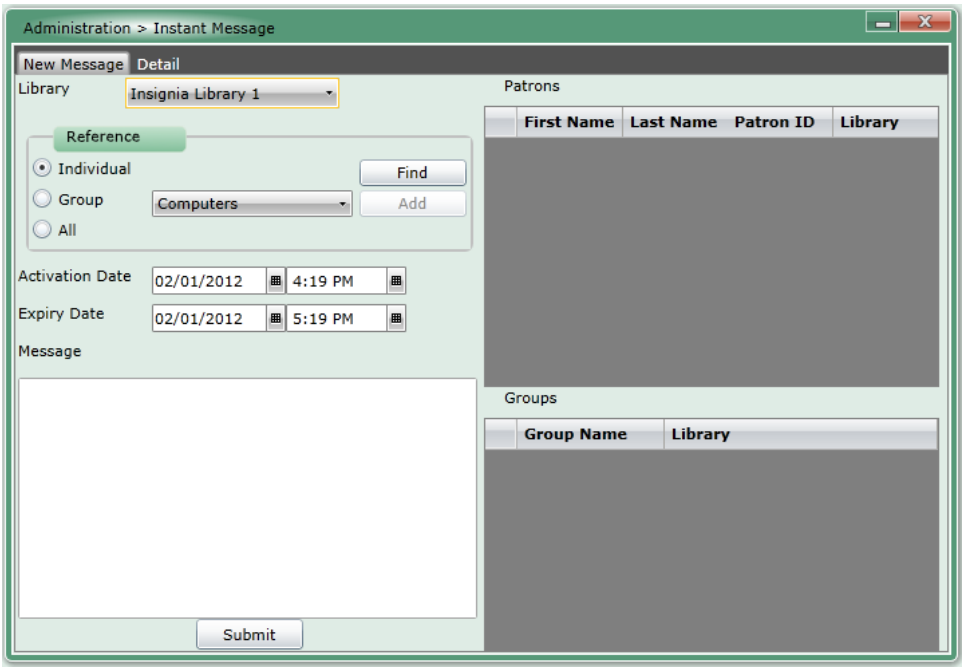
1. Click Password on the Menu.
2. Input the old password.
3. Enter the New password and enter it again for confirmation.
4. Click Change.

Instant Message

Use the instant message feature to send messages from one logged in work station to the other through the Insignia application.

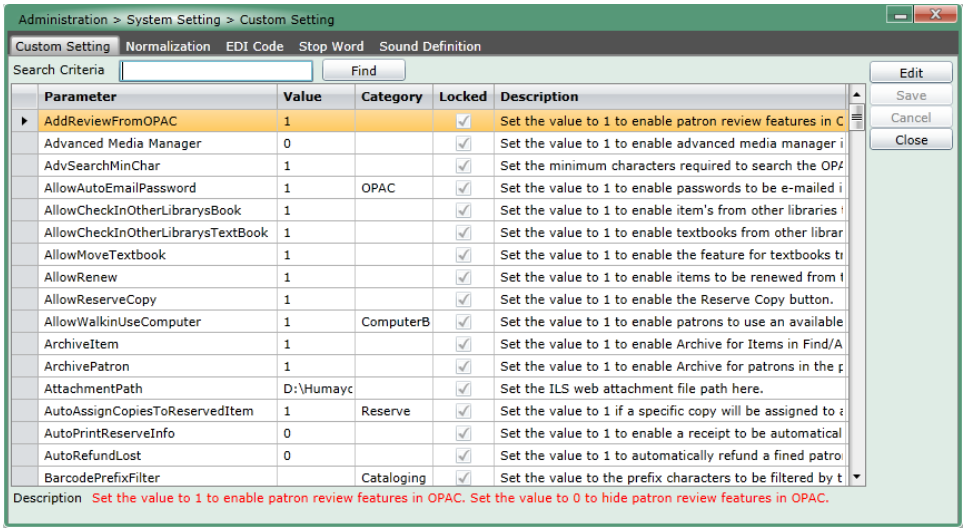
New Message

1. Click **Administration > Instant Message**.
2. Select the Individual, Group or choose to send to all.
3. Next select the messages Activation date and its expiry date
4. Enter your message in the message box
5. Then click submit for this message to be sent to the recipients.



Custom Setting

The Custom Setting tab is only available when logged in as an administrator. This feature allows features to be customized (enabled or disabled) based on library's needs. Descriptions of the Custom Setting are provided at the bottom of the window when the setting is selected.



1. **Add Review from OPAC**: Set the value to 1 to enable patron review features in OPAC. Set the value to 0 to hide patron review features in OPAC.
2. **Advanced Media Manager**: Set value to 1 to enable advanced media manager interface in ILS and OPAC. Set value to 0 to hide advanced media manager in the ILS and OPAC.
3. **Adv Search Min Char**: Set the minimum characters required to search the OPAC here.
4. **Allow Auto Email Password**: Set the value to 1 to enable passwords to be e-mailed in the OPAC and the **Silverlight login**: Set the value to 0 to hide the email passwords in the OPAC and Silverlight login.
5. **Allow Check In Other Library's Asset**: Set the value to 1 to enable assets from other libraries to be checked in.
6. **Allow Check In Other Library's Book**: Set the value to 1 to enable items from other libraries to be checked in.
7. **Allow Check In Other Library's TextBook**: Set the value to 1 to enable textbooks from other libraries to be checked in.
8. **Allow Move Textbook**: Set the value to 1 to enable the feature for textbooks transfer from one district site to another.
9. **Allow Renew**: Set the value to 1 to enable items to be renewed from the Web OPAC.
10. **Allow Reserve Copy**: Set the value to 1 to enable the Reserve copy button to be available.
11. **Allow Walkin Use Computer**: Set the value to 1 to enable patrons to use an available computer without booking.
12. **Archive Item**: Set the value to 1 to enable Archive for Items in Find/Add Catalog window.
13. **Archive Patron**: Set the value to 1 to enable Archive for patrons in the patron window.
14. **Asset Customized Field 1**: Name of Asset Customized Field 1.
15. **Asset Customized Field 2**: Name of Asset Customized Field 2.
16. **Asset Customized Field 3**: Name of Asset Customized Field 3.
17. **Asset Customized Field 4**: Name of Asset Customized Field 4.
18. **Asset Customized Field 5**: Name of Asset Customized Field 5.
19. **Asset Customized Field 6**: Name of Asset Customized Field 6.
20. **Asset Customized Field 7**: Name of Asset Customized Field 7.
21. **Asset Customized Field 8**: Name of Asset Customized Field 8.

22. **Asset Customized Field 9**: Name of Asset Customized Field 9.
23. **Asset Customized Field 10**: Name of Asset Customized Field 10.
24. **Asset Circulate District Based**: Set the value to 1 for a prompt to appear upon asset check in allowing the user to assign the asset to their library. Set the value to 0 for this prompt to be disabled.
25. **Asset District Based**: Set the value to one for Assets to be System based. Set the value to 0 for Assets to be site based.
26. **Attachment Path**: Set the ILS web attachment file path here.
27. **Auto Assign Copies To Reserved Item**: Set the value to 1 if a specific copy will be assigned to a patron when a reserve is placed on it. Set the value to 0 if no specific copy will be held.
28. **Auto Print Reserve Info**: Set the value to 1 to enable a receipt to be automatically printed for items with reservations upon check in.
29. **Auto Refund Lost**: Set the value to 1 to automatically refund a fined patron if the item claimed lost is found. Set the value to 0 to not automatically refund the fined patron.
30. **Barcode Prefix Filter**: Set the value to any letter to ignore Prefix letter created by the scanner.
31. **Barcode Print District Based**: Set the value to 1 to print the districts name on barcodes. Setting the value to 0 will print the library name only.
32. **Barcode Suffix Filter**: Set the value to any letter to ignore the Suffix letter created by the scanner.
33. **Barcode to Clear Screen**: Enter a barcode and when it is scanned it will clear the checkout windows information.
34. **Browse Index Library Based**: Set the value to 1 and searching the current library in the Web OPAC will only show that library's index.
35. **Calculate On Loan Fine**: Set the value to 1 to enable fines to be calculated continuously (slows the system). Set the value to 0 for fines to be calculated upon check in of the item.
36. **Call No Tag**: Enter the call number tag to be used if a standard call number is not being used.
37. **Catalog During Checkout**: Set the value to 1 to enable cataloging items during checkout.
38. **Change Language**: Set the value to 1 to enable language change feature in the OPAC.
39. **Checkout Receipt Additional Msg**: The value entered here will appear at the bottom of checkout receipts.
40. **Chinese Keyword Search**: Set to 1 to enable Chinese keyword search in the OPAC.
41. **Chinese Traditional Keyword Search**: Set to 1 to enable Chinese Traditional Keyword search in the OPAC.
42. **Circ Limit School Based**: Set the value to 0 for the local school limits to apply. Set the value to 1 for both local limit and global limit to apply.
43. **Circulation Notice**: Set the value to 1 for an email to be automatically sent when a reserved item is checked in.
44. **Colorado Swift**: If the value is set to 1 the copy status "In" in the Z39.50 results will appear as "available".
45. **Computer Booking Default Password Option**: Set the value to 0 to use the random password generated in the computer booking window as the login at the computer stations. Set the value to 1 for patron ID and password to be used as the login at computer stations and ID.
46. **Computer Booking Period**:
47. **Code 39 Shrink Pixel**: This setting is for Insignia Technical Support only. The default is 0.9 for code 39 (ILS).
48. **Code 39 Wide To Narrow Ratio**: This setting is for Insignia Technical Support only. The default is 2.0.
49. **Colorado Swift**: If the value is set to 1 the copy status In = Available in the Z39.50 results. If the value is set to 0 copy status In = In.
50. **Computer Booking Default Password Option:** If set to 0 the random password is used by default and if the value is set to 1 the patron can user their password and ID.
51. **Computer Booking Period**: Set the value to 0 to set 1 hour computer booking blocks or 0 for half hour computer booking blocks.
52. **Copy Customized Field 1**: Name of Copy Customized Field 1.
53. **Copy Customized Field 2**: Name of Copy Customized Field 2.
54. **Copy Customized Field 3**: Name of Copy Customized Field 3.
55. **Copy Customized Field 4**: Name of Copy Customized Field 4.
56. **Copy Customized Field 5**: Name of Copy Customized Field 5.

57. **Copy Customized Field 6**: Name of Copy Customized Field 6.
58. **Copy Customized Field 7**: Name of Copy Customized Field 7.
59. **Copy Customized Field 8**: Name of Copy Customized Field 8.
60. **Copy Customized Field 9**: Name of Copy Customized Field 9.
61. **Copy Customized Field 10**: Name of Copy Customized Field 10.
62. **Copy Default Allow ILL**: Set this value to 1 to Allow Interlibrary Loan to be selected as the default when creating a new copy.
63. **Copy Number District Based**: Set this value to 1 to enable the copy number to be based on the systems copies.
64. **Create New Copy When 852 Tag Exists**: Set to 1 to make a new copy when the 852 tag exists (even without a barcode).
65. **Custom Layout District Based**: Set to 1 to enable barcode custom layouts to be viewed by the entire district.
66. **Date Format**: Set the value to 0 enables the format DD/MM/YYYY and 1 enables the format MM/DD/YYY.
67. **Decentralized:** Set the value to 0 to create a centralized cataloging system (all items belong to all schools). Set the value to 1 to create a partially centralized system (items belong to schools but parameters are shared). Set the value to 2 for a decentralized system (items belong to the school that cataloged it and parameters are not shared).
68. **Default eBook School Based**: Set the value to 1 to auto check off the eBook School Based option in the import page.
69. **Default Result Display Mode**: Set to 0 to change the search results in the grid.
70. **Display Local Call No**: Set the value to 1 to display local call numbers in the search results list.
71. **Display Order Status Online**: Set the value to 1 to show items on the OPAC that have been ordered with the status On Order. To hide ordered items prior to being received set the value to 0.
72. **District Based**: Set the value to 1 to enable a district based environment. Set the value to 0 for an independent environment. This affects the item circ type and group settings. This is for initial setup only.
73. **District Name**: Enter the name of the district as it will appear on barcode labels.
74. **DM Number Position**: Set the location of the DM Number (the number of the in customized field).
75. **DM URL**: Set the URL for the DM, for i.e. http://dmxlink1p/cyberdocs/quickstart.asp?altentry=Yandpapi=bypassandShow=View:DMNumberanduser=guest_public:guestandnoframes
76. **Do Not Include Other Library Info In Report**: Set the value to 0 to include other library information in reports. Set the value to 1 not include other library information in reports.
77. **Duplicate Order Warning**: Set the value to 0 never to check for duplicate records when ordering or set the value to the last number of days to check for the item being ordered.
78. **Enable Auto E-mail Process:** Set the value to 1 to allow sending emails daily automatically for the overdue/fine/expiry information.
79. **Enable Collection Analysis**: Set the value to 1 to enable the Collection Analysis feature.
80. **Enabled Silverlight Desktop**: Set the value 1 to enable installation of ILS Silverlight desktop (offline circulation).
81. **Enable Ecommerce**: Set the value to 1 to enable payment with credit cards and debit cards. Set the value to 0 to disable the credit cards and debit cards payment options.
82. **Enable Feedback Feature:** Set the value to 1 to enable the feedback feature under help menu.
83. **Enable NCIP**: Set to 1 to enable NCIP feature in Silverlight:
84. **Enable Report Schedule**: Set the value to 1 to enable reports to be scheduled. Set the value to 0 to hide the schedule report feature.
85. **Enable Sync Feature**: Insignia Technical Support Only. Set to 1 to enable a database sync. Set to 0 if no sync is required.
86. **Facebook ID**: Insert the Facebook ID of the district Facebook page here. This information is in the URL of the page and is the text appearing after http://www.facebook.com/. This setting controls the Facebook id appearing in the top right-hand corner of the page.
87. **Favorite Email Address**: The value entered here will be listed as the sender of outgoing emails listings Favorites in the OPAC.

88. **Feedback Period:** Every xx months we popup feedback automatically.
89. **Fix Booking Period According to Circ Type:** Set the value to 1 to have the "override" loan period default checkbox selected.
90. **Fixed Phone Format:** Set the value to 1 to enable fixed phone format.
91. **Hide Homeroom**: Set the value to 0 to enable homeroom related features. Set the value to 1 to hide the homeroom related features.
92. **Hide Textbook**: Set the value to 1 to hide textbook related features. Set the value to 0 to enable textbook related features.
93. **Hide Ask Librarian**: Set the value to 1 to hide the Ask Librarian feature. Set the value to 0 to enable Ask Librarian Feature.
94. **Hide Patron Group**: Set the value to 1 to hide patron group in patron barcode. Set the value to 0 to display the patron group in the patron barcode.
95. **Hide Phone Area Code**: Set the value to 1 to hide the area code. Set the value to 0 to display area code.
96. **Hide Show Me**: Set the value to 0 to enable Show Me video buttons. Set the value to 1 to hide the Show Me video buttons.
97. **Hide Textbook**: Set the value to 0 to enable textbook related features. Set the value to 1 to hide textbook related features.
98. **Holiday District Based District**: Set the value to 0 to disable district based holidays. Set the value to 1 to enable based holiday district.
99. **Hybrid Group**: Set to 1 to enable schools to see local group and district group
100. **IM Polling Interval**: The interval of the chat polling process. A larger interval will require more server memory and will send instant messages more quickly.
101. **Inactive Patron Period**: Set the number of days that a patron has not circulated items becomes inactive.
102. **Indicator Allow#:** During export of items set the value to 1 to enable # signs in the indicator field. Set the value to 0 to hide # signs in the indicator field.
103. **In Touch Export Path**: This setting enables the ability to share data with In Touch (fines application). To export from ILS enter pathway, i.e. C:\ILSFine.txt here.
104. **In Touch Import Path**: This setting enables the ability to share data with In Touch (fines application). To import from ILS enter pathway, i.e. C:\InTouch.txt here.
105. **In Touch Log Path:** This setting enables the ability to share data with In Touch (fines application). Enter pathway to log here, i.e. C:\InTouchLog.txt.
106. **Is Public Library:** Set the value to 0 for a School Library. Set the value to 1 for a public library.
107. **Item Customized Field 1:** Name of Item Customized Field 1.
108. **Item Customized Field 2:** Name of Item Customized Field 2.
109. **Item Customized Field 3:** Name of Item Customized Field 3.
110. **Item Customized Field 4:** Name of Item Customized Field 4.
111. **Item Customized Field 5:** Name of Item Customized Field 5.
112. **Item Customized Field 6:** Name of Item Customized Field 6.
113. **Item Customized Field 7:** Name of Item Customized Field 7.
114. **Item Customized Field 8:** Name of Item Customized Field 8.
115. **Item Customized Field 9:** Name of Item Customized Field 9.
116. **Item Customized Field 10:** Name of Item Customized Field 10.
117. **Item Circ Rpt No Price:** Set the value to 1 to hide prices displayed on items in circulation report. Set the value to 0 to enable the price to be displayed on the items in circulation report.
118. **Item Circ Type School Based:** Set the value to 1 to enable the circ type to be school based. Set the value to 0 to set the circ type to be system based.
119. **Item Price:** Set the value to 1 to enable price entry on the Basic Information window in the cataloging module. Set the value to 0 to hide the price entry on the Basic Information window in the cataloging module.
120. **Japanese Keyword Search**: Set the value to 1 to enable a Japanese keyword search in the Web OPAC. Set the value to 0 to disable a Japanese keyword search.
121. **Keep Favorite After Logout**: Set the value to 1 to maintain Favorites after logout. Set the value to 0 to disable this feature.

122. **Keep Sip Connection**: Set the value to 1 to maintain one connection for all messages. Set the value to 0 to assign new connections for each message.
123. **Key Down Speed Time**: Enter the time in milliseconds between key strokes to select a value.
124. **Kiosk**: Set the value to 1 to enable the kiosk module. Set the value to 0 to disable the kiosk module.
125. **Kiosk District Based District**: Set the value to 1 to make the kiosk district based.
126. **Latin System**: Set to 1 to disable Latin System. Set to 0 to enable this system.
127. **Library Auto Email Address**: This email address is used to send emails when there is no email address in the library profile.
128. **Library Web Site**: Enter the library's website here.
129. **Lock Password Times**: Set the value to zero; user can keep trying. Set the value to greater than zero; the password typed is incorrect that many times then the user account is blocked.
130. **Log Web Error**: This setting is for Insignia Technical Support Only. Set to 1 to log a web error.
131. **Lost Fine Take Replacement without Formula If Price Not Set**: Set the value to 1, so that if there is no price assigned to an item and a price is required the replacement cost will be applied.
132. **Magazine Collection Type Is a Must**: Set to 1 to create magazine collection type automatically if it doesn't exist.
133. **Magazine Library Based**: Set the value to 1 if serial cataloging is system based. Set the value as to 0 if serial cataloging is site based.
134. **Maximum Picture Size**: We will compress the picture if its size is too big in homeroom checkout; the value is how many KB.
135. **Media Manager**: Set the value to one to enable the media manager module in the OPAC. Set the value to 0 to hide the media manager module in the OPAC.
136. **Mis-Shelved Off By**: Set the value to 1 to ignore mis-shelved items during the inventory process. The value can be set to how mis-shelved the book is to be detected (i.e. 3).
137. **My Account**: Set the value to 1 to enable patron's access to their account information on the OPAC. Set the value to 0 to deny patrons access to their account information on the OPAC.
138. **Need Password To Self-Checkout**: Set the value to 1 to need password to self-checkout.
139. **New Asset Logic**: When value = 0, we use the old table, old logic for asset. When value =1, we will use new tables, new logic.
140. **New Book Status Period**: Set the value to > 0 for a prompt to appear during check in notifying library staff that it is a new book. Set the value to 0 to disable this prompt.
141. **NLM**: Set the value to 1 to enable the NLM call number in the 060 field. Set the value to 0 to hide the NLM call number field 060.
142. **One Group Policy**: Set the value 1 to only allow a patron to belong to 1 group. Set the value to 0 to enable patrons to belong to multiple groups.
143. **Online Meeting Link**: Enter the Link to Team Viewer here.
144. **Only Show Title with Copy**: Set the value to 1 to retrieve only titles with copies in search results. Set the value to 0 to retrieve titles without copies too.
145. **OPAC CIRC Check in**: When the network connection is slow OPAC can be used to check in books. Set the value to 1 to enable check in tab the OPAC.
146. **OPAC CIRC Checkout**: When the network connection is slow OPAC can be used to check out books. Set the value to 1 to enable check out tab in the OPAC.
147. **OPAC Link**: Enter the OPAC link here (if not standard) for ILS login link.
148. **OPAC Spell Check**: Set the value to 1 to enable spelling suggestions when no results are retrieved. Set the value to 0 to hide suggestions when no results are retrieved.
149. **Order Overdue Period**: Set the value to the amount of days needed to pass before an order becomes overdue. Set the value to 0 to never check for overdue orders.
150. **Outreach Feature**: Set the value to 1 to enable the outreach feature. Set the value to 0 to hide it.
151. **Patron Customized Field 1**: Name of Patron Customized Field 1.
152. **Patron Customized Field 2**: Name of Patron Customized Field 2.
153. **Patron Customized Field 3**: Name of Patron Customized Field 3.
154. **Patron Customized Field 4**: Name of Patron Customized Field 4.
155. **Patron Customized Field 5**: Name of Patron Customized Field 5.

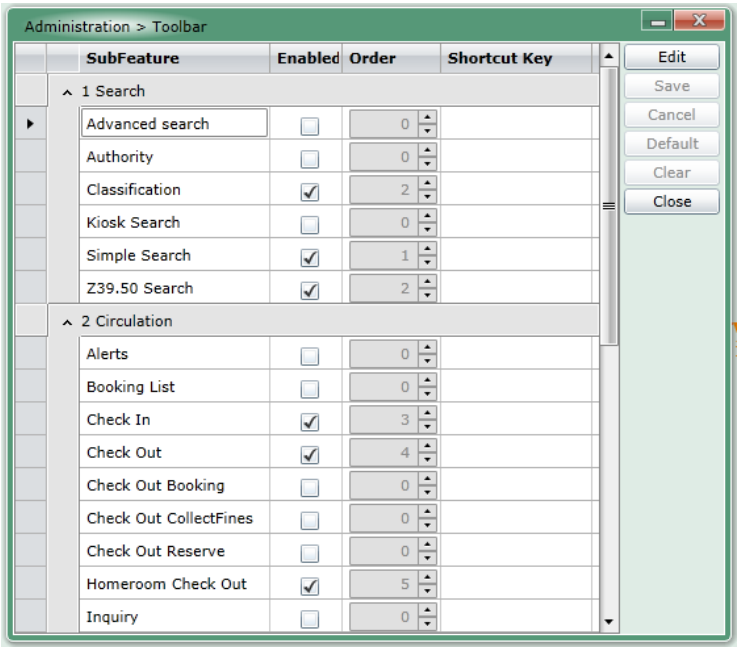
156. **Patron Customized Field 6**: Name of Patron Customized Field 6.
157. **Patron Customized Field 7**: Name of Patron Customized Field 7.
158. **Patron Customized Field 8**: Name of Patron Customized Field 8.
159. **Patron Customized Field 9**: Name of Patron Customized Field 9.
160. **Patron Customized Field 10**: Name of Patron Customized Field 10.
161. **Patron Universal Library ID**: Set the value to a library ID for the patrons to belong to the system. Leave empty for the patron to belong to local library.
162. **Precise Search**: Set the value to 1 to enable search to of exact word. Set the value to 0 to enable search of word as a wild card (i.e. s catastrophe will be retrieved for search term cat)
163. **Print Customer Name On Receipt**: Set the value 1 to enable patrons name to be printed on the receipt. Set to 0 to not print patrons name on receipt.
164. **Projects**: Set the value to 1 to enable the projects module in the OPAC. Set the value to 0 to hide the projects module.
165. **Prompt Change Call No When Item Call No Changed**: A prompt will appear for the copy call number to change when the item call number is changed.
166. **Prompt Dummy Barcode**: Set the value to 1 to select if you wish to print the library name when you print the dummy barcode.
167. **Quick Checkin and Checkout**: Set the value to 1 to enable check in and check out multiple items quickly.
168. **Receipt Print Type**: Set to 0 to print using Silverlight and 1 to print PDF.
169. **Record Management**: Indicate if it is a record management system.
170. **Reload Captions**: Set it to 1 to reload captions in.
171. **Reload Custom Setting Custom Setting**: Set it to 1 to reload custom setting in OPAC.
172. **Remember Last Login**: Set the value to 1 for the last user IDs login to be remembered in ILS login. Set the value to 0 to clear the login user ID after logging out.
173. **Remove Description**: Set to 1 to remove group and homeroom from patron barcode label (public library setting).Used for public libraries to removes group, homeroom from patron barcode label
174. **Remove Spectrum Checkdigit**: Set to 1 to check digit when formatting barcodes.
175. **Report Designer**: Set the value to 1 to enable Report Designer. Set the value to 0 to hide Report Designer.
176. **Require Login**: Set the value to 1 to enable login only access to OPAC. Set to 0 to allow access to OPAC without login.
177. **Reserve Available Prior Months**: Enter the time (in months) for reserves to show in the reserve list. Shows the reserves in the reserve list for the time period.
178. **Reserve Order**: Set the value to 1 to make the order of reserve list on a first come first serve basis. Set the value to 2 to base the order of the reserve list on available copies at pickup location.
179. **Right to Left**: Set the value to 1 to support Arabic Right to left.
180. **Select Asset In Circulation Form**: Set to 1 to make the asset checkbox selected by default in checkout form.
181. **Select Textbook In Circulation Form**: Set the value to 1 to make the textbook checkbox selected by default.
182. **Self-Checkout Days before Expiry Date**: Set the days before the expiry date of patron to continue using self-checkout.
183. **Send Library Card Expiry Info:** Set to 1 to allow system to send out card renewal message when it is about to expire.
184. **Series Tag**: Enter the series tag here (if the standard series tag is not used).
185. **Show AR Info Without Value**: Set the value to 1 to show AR labels even when there is no AR value.
186. **Show Audience**: Set the value to 1 to enable the audience search filter in the Advanced search in the OPAC. Set the value to 1 to hide the audience search filter.
187. **Show Available Reserve for Current Library Only**: Set the value to 1 to only show currents library's available reserve. Set the value to 0 to show all library's in the district available reserve copies in the reserve list.
188. **Show Barcode In Search**: Set the value to 1 for the barcode to appear in search results copy grid. Set the value to 0 to hide the barcode.

189. **Show Collection Type**: Set the value to 1 to show the collection in OPAC advanced search. Set the value to one to hide the collection in OPAC advanced search.
190. **Show Cover Image**: Set the value to 1 to enable the cover image to be viewed in the OPAC. Set the value to 0 to hide the cover image in the OPAC.
191. **Show Expire Next Month Info**: Set the value to 1 to display expiry date when library card expires in thirty days. Set the value to 0 to not display the expiry when card expires in thirty days.
192. **Show Export Delete Item**: Set the value to 1 to show the Delete Item in export. Set the value to 0 to hide the Delete Item in export.
193. **Show Import All Tag**: Set the value to 1 to show import all tags in import. Set the value to 0 to hide show import.
194. **Show ISBN**: Set the value to 1 to display the ISBN in the search results in the OPAC. Set the value to 0 to not display the ISBN in the search results in the OPAC.
195. **Show Library**: Set the value to 1 to display the library name in search results. Set the value to 0 the hide the library name in search results.
196. **Show Library Types**: Set the value to 1 to add library type logic. Setting the value to 0 to original logic.
197. **Show Material Type In Title**: Set the value 1 to display the material type in the title. Set the value to 0 to hide in the material type in the title.
198. **Show New Book Request Book Request**: Set the value to 1 to enable the new book request module. Set the value to 0 to hide the new book request module.
199. **Show Normalize Barcode**: Set the value to 1 to set the normalize barcode checkbox to be selected by default in check in, checkout, and renew windows. Set the value to 0 to deselect the normalize barcode checkbox by default.
200. **Show Other Library Patron Name In Copy Info**: Set the value to 1 to display other library's patron name in copy information. Set the value to 0 to hide other library's patron name in copy information.
201. **Show Phone Info In Checkout Window**: Set the value to 1 to display phone information in the checkout window. Set the value to 0 to hide phone number information in the checkout window.
202. **Show Published Date**: Set the value to 1 to display the publication date in the OPAC. Set the value to 0 to hide the publication date.
203. **Show Rating**: Set the value to 1 to enable all features related to rating in the OPAC. Set the value to 0 to hide all features related to rating in the OPAC.
204. **Show Section Of A Work In Title**: Set the value to 1 to display tag 245NP information in the title. Set the value to 0 to not display 245NP information in the title.
205. **Show Subject**: Set the value to 1 to display the subject in OPAC search results. Set the value to 0 to hide subject in OPAC search results.
206. **Show Target Audience in OPAC**: Set the value to 1 to display the target audience in the OPAC. Set the value to 0 to hide target audience information in the OPAC.
207. **Show Video Method:** Set the value to 1 to download Show Me video before playing. Set the value to 0 to stream video while downloading.
208. **Show Weather in OPAC:** Set to 1 to show weather information in the OPAC on the Home tab. Set to 0 to hide the weather information.
209. **SIF Staff Library ID Type**: For Insignia Technical Team Only.
210. **SIF Student Library ID Type**: For Insignia Technical Team Only.
211. **Silverlight Login Message**: A message entered in this field will appear on the ILS Login Screen in red.
212. **Simplified Subject Interface**: Set the value to 1 to display the simplified subject interface in the catalog feature. Set the value to 0 display the detailed subject interface in cataloging.
213. **SIP Use Password For Msg 63**: Used by Insignia for SIP II message.
214. **SIP Use Patron Barcode**: Set the value to 1 for the barcode to be used for authentication. Set the value to 0 for the patron ID to be used for authentication.
215. **Smart Barcode Checkout**: Set the value to 1 to enable Smart Barcode (ability to distinguish between patron and item barcodes in ILS). If this feature is enabled a patron barcodes are recognized as patron barcodes when scanned into the copy barcode field in the checkout window. Set the value to 0 to disable the Smart Barcode feature.

216. **Subscription Page**: Enter the URL for the web page that will be launched when E-Services is enabled and selected on the OPAC.
217. **Syndetics Customer ID**: Enter the Syndetics Customer ID to Connect to Syndetics for cover images.
218. **Syndetics Search Time**: Enter the amount of days to wait after a failed cover image search from Syndetics to search again.
219. **Tag 852 Subfield a**: Set the value to 0 for the 852 tag subfield to be circ type. Set the value to 1 for the 852 tag subfield to be library name. Set the value to 2 for the 852 tag subfield a will not be exported.
220. **TB Barcode District Based**: When set to district, does that mean all of the sites have the same prefix? "Set the value to 1 for the textbook barcodes to be system based so all library sites have the same prefix. Set the value to 0 for the textbook barcodes to be site based which means each site will have their own prefix on the barcode."
221. **TB Circulate District based**: Set the value to 1 for a prompt to appear upon checking in a textbook from another school that allows the user to assign the textbook to their library.
222. **Textbook Customized Field 1**: Name of Textbook Customized Field 1.
223. **Textbook Customized Field 2**: Name of Textbook Customized Field 2.
224. **Textbook Customized Field 3**: Name of Textbook Customized Field 3.
225. **Textbook Customized Field 4**: Name of Textbook Customized Field 4.
226. **Textbook Customized Field 5**: Name of Textbook Customized Field 5.
227. **Textbook Customized Field 6**: Name of Textbook Customized Field 6.
228. **Textbook Customized Field 7**: Name of Textbook Customized Field 7.
229. **Textbook Customized Field 8**: Name of Textbook Customized Field 8.
230. **Textbook Customized Field 9**: Name of Textbook Customized Field 9.
231. **Textbook Customized Field 10**: Name of Textbook Customized Field 10.
232. **Textbook District Based**: Set the value to 1 for textbooks to be district based. Set the value to 0 for textbooks to be site based.
233. **Time Difference**: Use to match time difference between the server and the workstation. I.e. If the server is in MST and workstation is in EST, set the value to 2.
234. **Title Search No Series**: Set the value to 1 to disable searching a series title within a title search. Set the value to 0 to enable series title to be searched within a title search.
235. **Total Grades**: Maximum number of grades in the system (leave it to 15).
236. **Twitter ID**: Enter the Twitter ID in this field for the district. The Twitter ID is the part of the URL for Twitter following Twitter.com/.
237. **USA Captions**: Set the value to 1 to display USA caption, such as of states and zip codes. Set the value to 0 to display Canadian captions such as, provinces and postal codes.
238. **Use AR RC Lexile**: Set the value to 1 to enable AR, RC, and Lexile reading program features.
239. **Use Follett Format When Create New Copy**: Set the value to 1 to use the Follett barcode when the item is new. Set the value to 0 to not use the Follett Barcode for new items.
240. **User Defined Reserve Notification**: Set the value to 1 to use the system messages to prompt reserves. Set the value to 0 to not use system messages for reserves.
241. **User Kids Webopac**: Set the value to 1 to enable the Kids tab in the OPAC. Set the value to 0 to hide the Kids tab in the OPAC.
242. **Use SQL Mail**: Used by Insignia to setup email notification.
243. **Warn Inferior Quality MARC During MARC Import**: Set the value to 1 to enable a warning prompt when an inferior MARC record is replacing a better MARC record. Set the value to 0 to hide the warning prompt when an inferior record is replacing a better one.
244. **Warn TB Checkout By Schedule**: Set the value to 1 to enable a warning prompt when a patron checks out a textbook that is not needed based on their class schedule. Set the value to 0 to disable the warning prompt when a patron checks out a textbook that does not fit with their class schedule.
245. **Web API Rating Count**: In IPhone app search, if user does a rating search, we will return the maximum result based on this setting.
246.
247. **Web OPAC Login Prompt**: Set the value to a message to appear on ILS log in prompt.
248. **Web OPAC Logo Ratio**: Set the ratio of the logo in the OPAC. The default value is 1.

249. **Web OPAC Main Page**: Set the value to 1 to allow OPAC main page to be customized. Set to 0 to hide main page.
250. **Web OPAC Use Google Suggestions**: Set the value to 1 to allow OPAC to provide Google search suggestions (for spelling) also found in database.
251. **What Is New Time**: Set the value to 0 to search for new items up to a month old. Alternatively, set the value to the number of days that an item is considered new.
252. **What Is New Top**: Specify the maximum number of new items to display in OPAC.
253. **Z39 District Based**: Set the value to 1 for Z39.50 settings to be system based. Admin All adds the hosts and they show for all sites. Set the value to 0 for Z39.50 settings to be site based. Local admin adds the hosts and it shows only for that local library site.

Quick Toolbar



There is a quick access toolbar between the file menus and the main program body. The quick toolbar icons can be customized to list the most frequently used features for easy access.

Enable

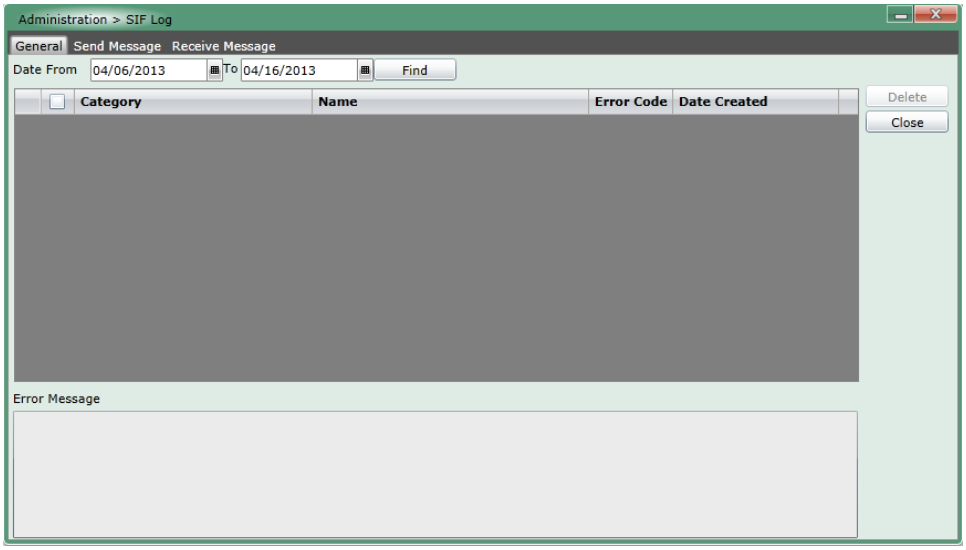
1. Click Administration > Quick Toolbar.
2. Click Edit.
3. Check the enable box beside the features to add it to the toolbar.
4. Step short cut keys for Internet Explorer, Apple Safari, Mozilla Firefox, and Google Chrome.
5. Provide the order that the icons should appear in.
6. Click Save.

Clear

1. Click Administration > Quick Toolbar.
2. Click Edit.
3. Select feature to remove and click Clear.
4. Click Save.

SIF Log

You can use this window to view the SIF log. It will show you a full log of errors and other messages to do with SIF.



Textbooks Module

Textbooks Module

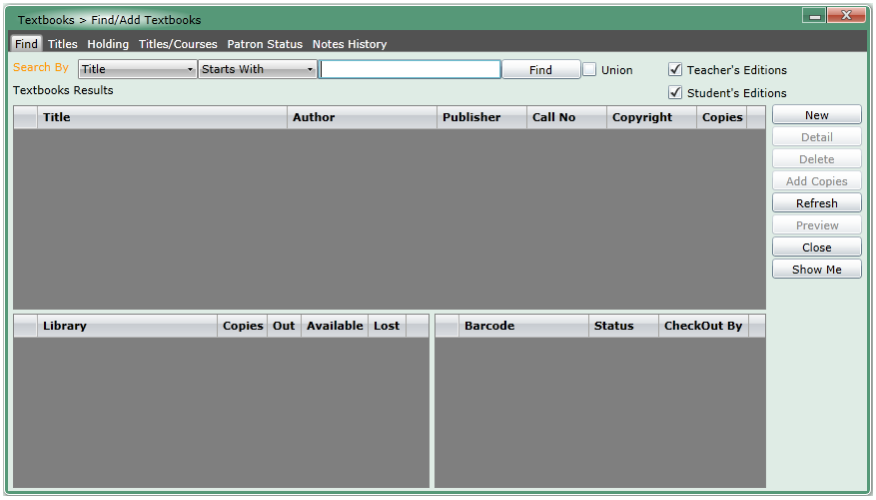
Insignia Library System (ILS) allows staff to track textbooks in a given school or in the district. The administrator can determine which school has a shortage or surplus of textbooks based on student schedule and current inventory. Staff can print out transfer textbooks and print packing slips. This enables the district to make the best use of textbooks in the district.

1. Find / Add Textbooks
2. Merge
3. Delete
4. Site Transfer / Receive
5. Inventory Status
6. Change Status
7. Statistics
8. Check In
9. Check Out
10. Textbook Barcode
11. Renew / Transfer
12. Request/Transfer

Find/Add Textbooks

Find

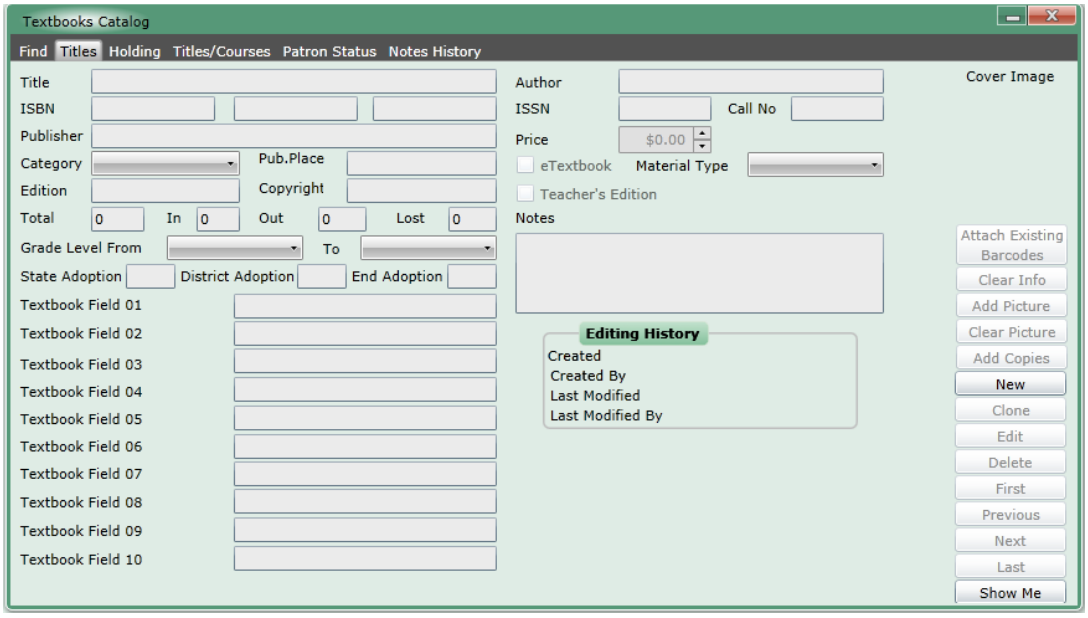
1. Click Textbook > Find/Add Textbooks.
2. Search for the textbook by any of the available parameters including keyword.
   2.1. When searching by barcode, only the holding with that barcode will be returned in the search. Barcodes can be searched by the following criteria: “Starts With”, “Exact Match”, and “Ends With”.
      2.1.1. To use the “Ends With” search, please see the Catalog Configuration’s Barcode Format Section and make sure that “Copy Quick Barcode” is checked.
   2.2. To see the inventory for entire district select the Union checkbox.
3. Inventory status for each school is given in the bottom grid.
4. To see the detail of a textbook, select the title and click Detail.



New

Create a new textbook record in the titles tab which can become shared by multiple holdings in one or more sites from across the district.

1. Click **Textbook > Find/Add Textbooks.**
2. Click New.
3. Enter the relevant information on the textbook title.
4. Additional information can be added to the record, such as Category, Adoption dates, Grade Range, and loading a cover image by clicking Add Picture. The Category dropdown can be established in the Parameters window.
5. If the fields for Material Type and Category are not listed in the drop down menus, then these will have to be set up in **Administration > System Setting > Parameters**.
6. Select the eTextbook checkbox if this textbook is an online or digital copy.
7. Select the Teacher's Edition if the textbook provides material specific to teachers such as additional teaching instructions or an answer guide.
8. Price can be added into a new Textbook that becomes copied for all the holdings.
9. View the Editing History at the button for information on who created and edited the textbook title. This information can become important when several sites with its own respective textbook copies share one title record in one site for the whole district.
10. When the record is complete, click Save.



Attach Existing Barcodes

1. Click Textbook > Find/Add Textbooks.
2. Click Attach Existing Barcodes.
3. Scan barcodes.
4. Select checkboxes on the left.
5. Click Apply.

Add Copies

1. Click Textbook > Find/Add Textbooks.
2. Search for the title.
3. Select the title.
4. Click Add Copies.

5. Enter the number of textbook copies to be added.
6. Enter additional information.
7. Click Save.

Delete

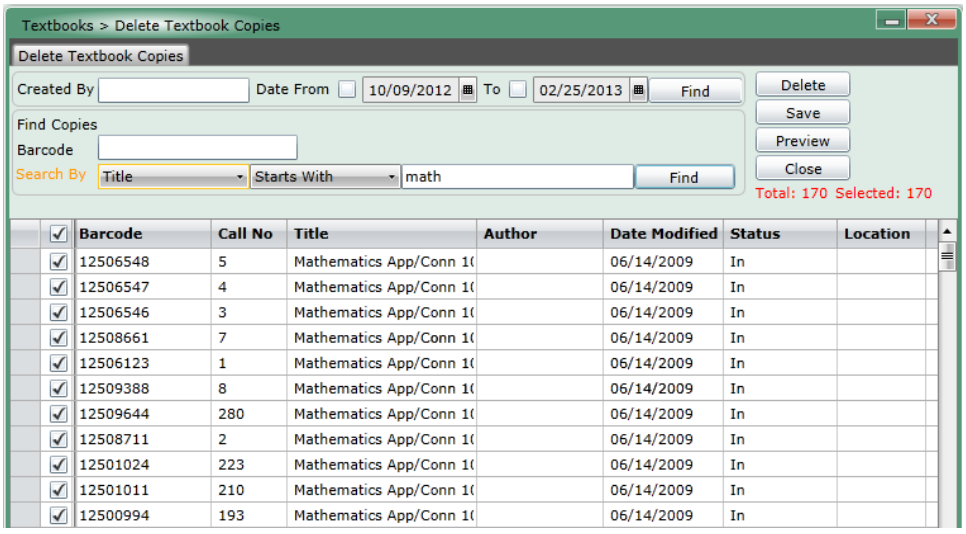
1. Click Textbook > Find/Add Textbooks.
2. Search for the title.
3. Select the title.
4. Click Delete.
5. Confirm your deletion.
6. Deleting a title will delete all the textbook copies linked to it, to delete individual copies follow step given in the next section.

Delete Copies

1. Click Textbook > Find/Add Textbooks.
2. Search for the title.
3. Select the title of the copy to be deleted.
4. Click the holdings tab.
5. Select the barcode to be deleted.
6. Click Delete.
7. Confirm deletion.

Delete Multiple Copies

1. Click Textbook > Delete.
2. Check the Union button if the textbooks are from more than just one location.
3. Scan the textbook barcodes.
4. Once all the Textbooks are scanned in, click Delete.



Apply Multicopies

The Apply Multicopies button can be used to set values for all textbook copies for this title. These fields are Price, Replacement Cost, Vendor, Circulation Type and Call Number.

1. Click **Textbook > Find/Add Textbooks**.
2. Search for the title.
3. Select the title.

4. Click the Holding tab.
5. Click

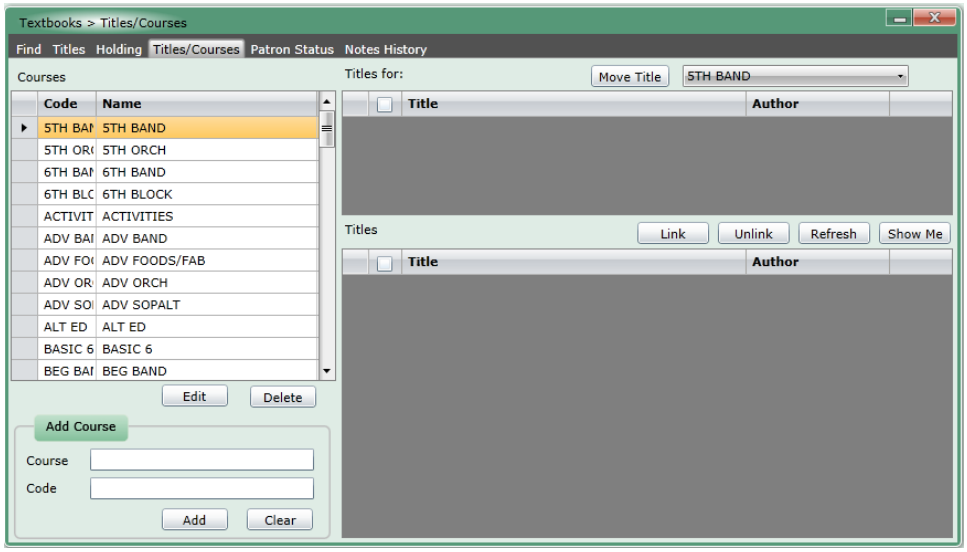
.
6. Checkmark the values that will be changed and enter the new value.
7. Check the apply to union checkbox if you want to change those values for all the copies in the District.
8. Click the Ok button to save changes.

Textbook Titles and Courses

This feature links together titles to keep track of which textbooks are required for which course.
Remove textbooks from courses by following steps 1-5 and clicking Unlink.

Link

1. Click **Textbook > Find/Add Textbooks**.
2. Click the Titles/Courses tab.
3. Select a course from the list on the left side of the screen.
4. Click Edit.
5. Check the textbooks to be linked from the list on the right.
6. Click Link.



Adding or Deleting a Course

To add a new course, fill in the information on the bottom left corner (title and course code) and click Add. To delete a course, select the course and click Delete.

Patron Status

Patron status allows staff to see textbooks that have been checked out by a patron.

1. Click **Textbook > Find/Add Textbooks**.
2. Click the Patron Status tab.
3. Enter patron information and click Find.

Notes History

Notes history displays all notes added to the textbook.

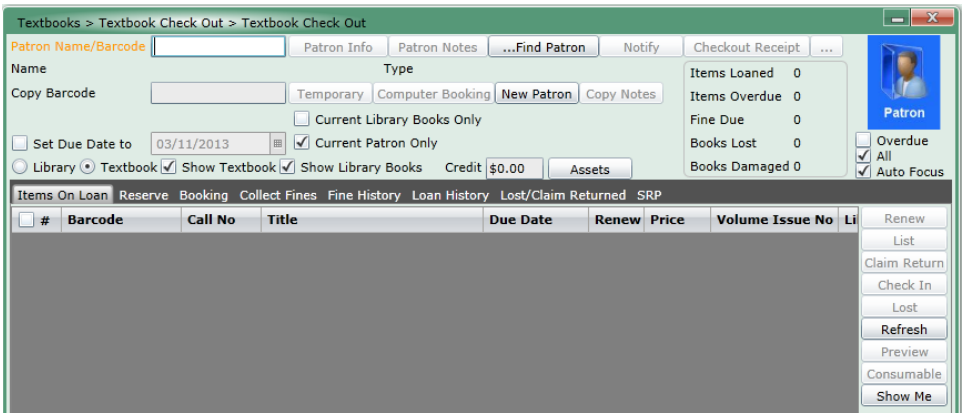
1. Click **Textbook > Find/Add Textbooks**.
2. Select search by barcode.
3. Scan the barcode.
4. Click the Notes History tab.

Check Out

Textbooks can be checked out using the **Circulation > Checkout** feature by selecting the Textbook radio button. Additionally, textbooks can be checked out in the textbook module. For a comprehensive listing of check out fields and other features, please see the Circulation Module for Checkout Items.

1. Click **Textbooks > Checkout**.
2. Scan in the patron or look them up by clicking on the Find Patron button.
3. Scan the Textbook barcode.

4. Repeat step #3 to check out other textbooks.

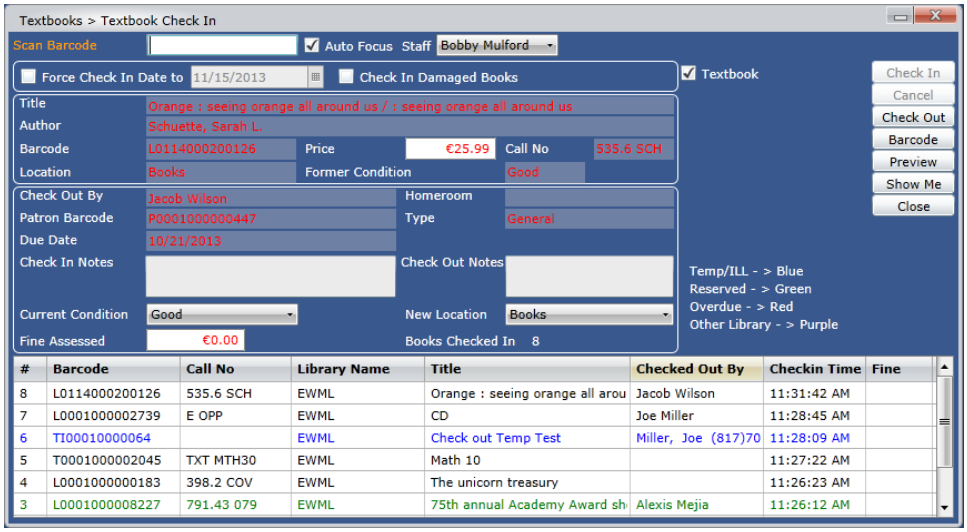


Check In

Textbooks can be checked in using the **Circulation > Check In** by checking the Textbook checkbox and scanning in the textbooks. Additionally, textbooks can be checked in using the textbook module.

1. Click **Textbooks > Check In**.
2. Scan the Textbook barcode.
3. Repeat step #2 to check in other textbooks.

In addition to the popup prompts, ILS shows items being checked in are displayed in different colors:
Red: item is overdue
Green: item is on reserve
Purple: item is an Item from another library
Blue: item is a Temporary or Interlibrary loan



Force Check In Date to

In ILS, the check in date can be altered. This feature is useful in the event of an interruption in library service and fines are being calculated. It is important that patrons are not fined for overdue textbook if the user is not able to check in items on time.

1. Select the Force Check In Date to checkbox.

2. Specify the appropriate date desired.
3. Scan the barcode for the textbook to be checked in
4. Until this form is closed or the check box is deselected, all textbooks will be checked in as if they were returned on the date specified.

Checking In Damaged Books

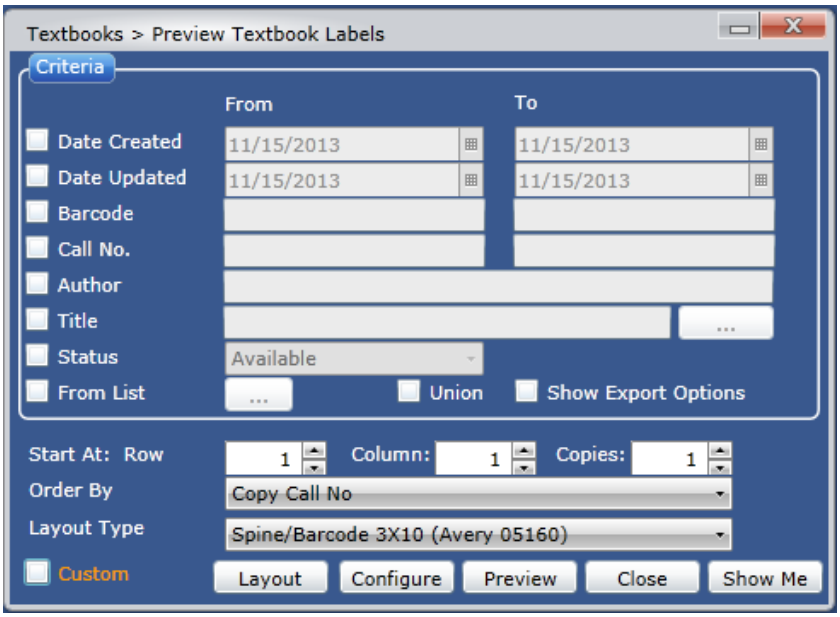
Fines may be assigned to patrons who return textbooks that are damaged. Additionally, damaged textbooks may be tracked.

1. Select Check in Damaged Books checkbox.
2. Scan in the textbook barcode.
3. Specify the condition, fine, location and comments.
4. Click Check In.

Textbook Barcode

Staff can print textbook barcodes in a variety of layouts.

1. Click **Textbook > Textbook Barcodes**.
2. Find the item to print barcodes for by choosing from the listed criteria. Options for criteria are:
   2.1. Date created
   2.2. Date updated
   2.3. Barcode range
   2.4. Call number range
   2.5. Author
   2.6. Title
   2.7. From list (a list of scanned barcodes)
3. Select the Order By dropdown menu to select order preference.
4. Select the Layout Type by clicking the Layout button.
5. Select Preview to display the barcodes to print in the window.
6. Click Preview.
7. The barcode report can save to a different file type by selecting Show Export Options. These options exist in print preview.



Custom Textbook Barcodes

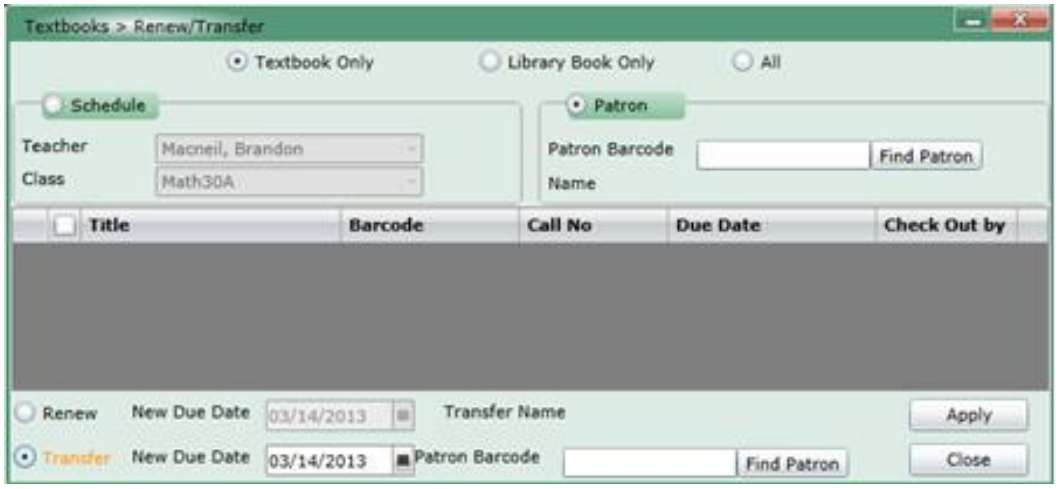
Before creating a custom label, call Insignia to request new labels.

1. Click Textbook > Textbook Barcodes.
2. Find the barcodes to print by choosing criteria.
3. Select the Order By dropdown menu to select order preference.
4. Check the Custom Checkbox.
   4.1. Select one from the dropdown list or
   4.2. Click Custom.

Renew / Transfer

Staff can renew or transfer books from one class and teacher to another.

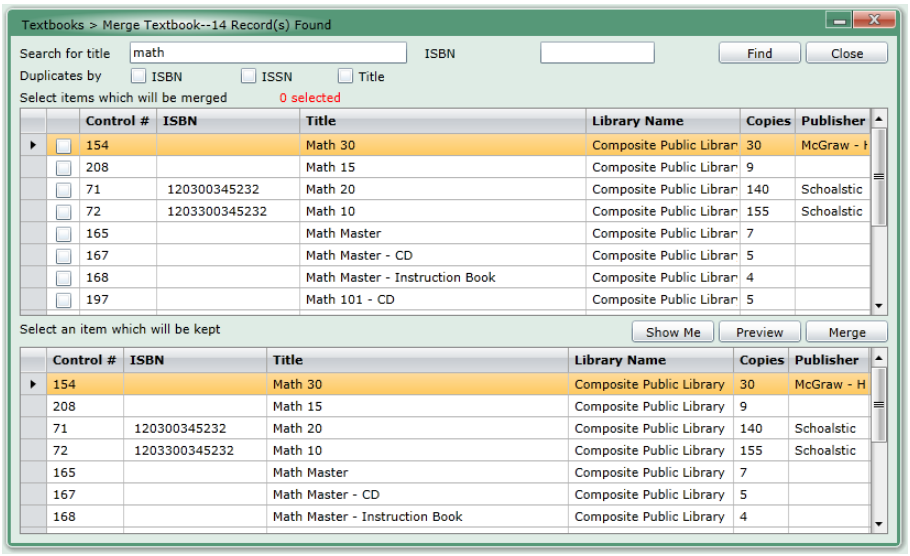
1. Click **Textbook > Renew / Transfer.**
2. Searching by Schedule.



3. Click the Teacher dropdown.
   3.1. Click the Class dropdown.
4. Searching by Patron.
   4.1. Scan or find the patron barcode.
5. Select Renew.
   5.1. Enter the New Due Date.
   5.2. Click Apply.
6. Select Transfer
   6.1. Enter the New Due Date.
   6.2. Scan or find the patron barcode to whom the textbook will be transferred.
   6.3. Click Apply.

Merge

The merge Textbook feature enables staff to merge textbooks titles that have been duplicated in error. The Library Name of the titles being merged will be listed beside the title in both the items which will be merged table and the item which will be kept table.

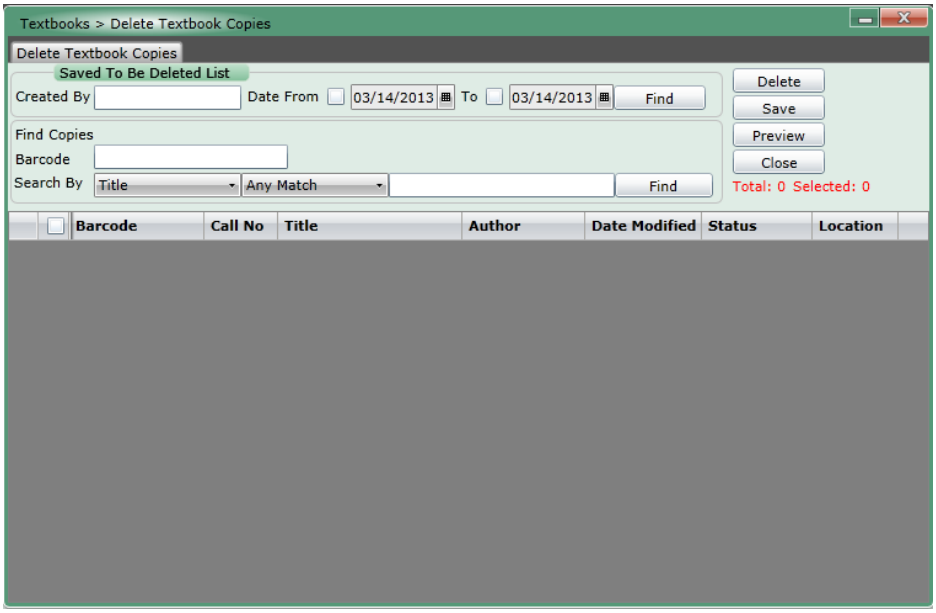

Textbooks > Merge Textbook--14 Record(s) Found
Search for title
math
ISBN
Find
Close
Duplicates by
ISBN
ISSN
Title
Select items which will be merged
0 selected
Control # | ISBN | Title | Library Name | Copies | Publisher
154 | | Math 30 | Composite Public Libran | 30 | McGraw - H
208 | | Math 15 | Composite Public Libran | 9 |
71 | 120300345232 | Math 20 | Composite Public Libran | 140 | Schoalstic
72 | 1203300345232 | Math 10 | Composite Public Libran | 155 | Schoalstic
165 | | Math Master | Composite Public Libran | 7 |
167 | | Math Master - CD | Composite Public Libran | 5 |
168 | | Math Master - Instruction Book | Composite Public Libran | 4 |
197 | | Math 101 - CD | Composite Public Libran | 5 |
Select an item which will be kept
Show Me
Preview
Merge
Control # | ISBN | Title | Library Name | Copies | Publisher
154 | | Math 30 | Composite Public Library | 30 | McGraw - H
208 | | Math 15 | Composite Public Library | 9 |
71 | 120300345232 | Math 20 | Composite Public Library | 140 | Schoalstic
72 | 1203300345232 | Math 10 | Composite Public Library | 155 | Schoalstic
165 | | Math Master | Composite Public Library | 7 |
167 | | Math Master - CD | Composite Public Library | 5 |
168 | | Math Master - Instruction Book | Composite Public Library | 4 |

1. Click **Textbook > Merge Textbooks.**
2. Type in the title or IBSN.
3. Specify any additional conditions, such as match by ISBN or title.
4. Click Find.
5. Select the checkboxes for the titles in the top to be merged.
6. Select a title in lower grid to be Merged To.
7. Click Merge.

Delete

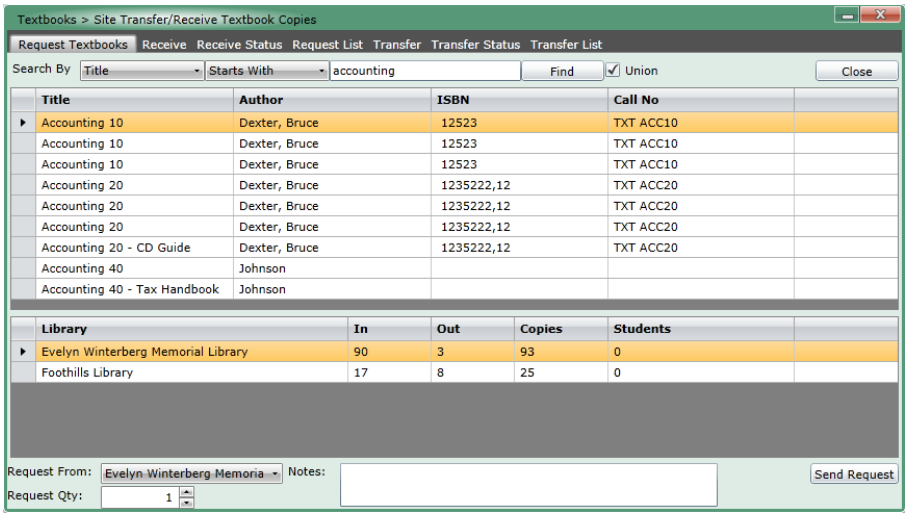
Delete textbook copies feature allows the precise search of copies for deletion.

1. Click **Textbook > Delete**.
2. Type in Created by, Date From, barcode, or Search By dropdown.
3. Click Find.
4. Select the checkboxes for the titles on the left for deletion.
5. Click Delete.



Site Transfer/Receive

The Transfer feature in the Textbook Module enables staff to transfer textbooks from one school to another in the District. This feature enables transfer and packing slips to be created as well as the ability to receive textbooks and send textbook requests.



Request Textbooks

1. Click **Textbook > Site Transfer/Receive.**
2. Use the Search By criteria to search for textbook titles. Click Union to search district-wide.
3. Select the textbook title you wish to request from the top grid.
4. In the bottom grid, select the local library with its respective textbook copy count to make a request.
5. Select the library name from the Request From dropdown and select the number of copies from the Request Quantity from the numeric textbox.
6. If necessary, add notes for the request in the textbox. Click Send Request.

Receive

7. Click **Textbook > Site Transfer/Receive.**
8. Click Receive tab.
9. Select the transfer from the dropdown.
10. Either scan the barcode to receive them or select the top checkbox to select all textbooks and click Receive.
11. See what has been received by clicking the Receive Status tab and selecting the Transfer Name from the drop down menu.
12. See if textbooks have been transferred the other school by clicking the Transfer Status tab and pick a transfer from the dropdown.

Receive Status

1. Click **Textbook > Site Transfer/Receive.**
2. Click Receive Status tab.
3. View the barcodes listed in the grid below.
4. View the library it's transferred from, the library it's being transferred to as well as the circulation type it will become, and its new location.

Request List

1. Click **Textbook > Site Transfer/Receive.**
2. Click Request List tab.
3. View the barcodes listed in the grid below.
4. See the title requested, author, the library where it will be transferred, whether or not the transfer was completed, the quantity requested, who requested it, the date of when the title was requested, and the date the request was completed.
5. Complete a request, by selecting the record and clicking "Complete".

Transfer

1. Click **Textbook > Site Transfer/Receive.**
2. Click Transfer tab. See what transfers have been created by looking at the grid below.
3. Specify which library the textbooks will be transferred to, circulation type, and location.

Note: See if any other school has made a request for textbooks by clicking the Request List tab.

4. Check the box if the library will become in the new owner (meaning the textbooks will not be returned).
5. Give a name to the transfer.
6. Select Send Notification, if needed.
7. Scan all barcodes to be transferred.
   7.1. To send a range of barcodes, check the Barcode range.
8. Click Transfer.

Transfer Status

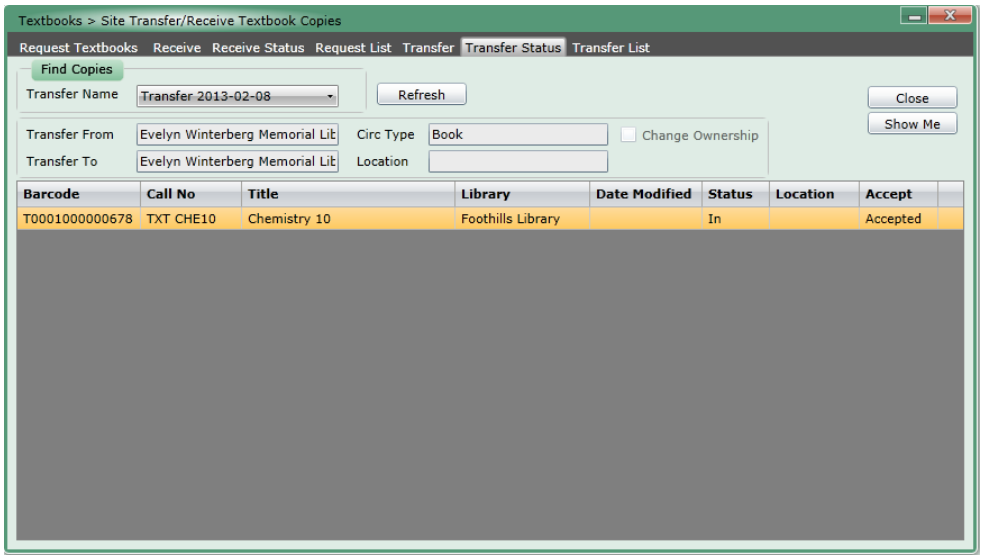
1. Click **Textbook > Site Transfer/Receive.**
2. Click Transfer Status tab. Select the transfer name from the dropdown.
3. View the status of the textbooks in the transfer in the grid below including the location, and whether or not the transfer has been accepted.
4. View the library where the transfer is from and where the transfer is going to, as well as the new circulation type and location set in the copy information.

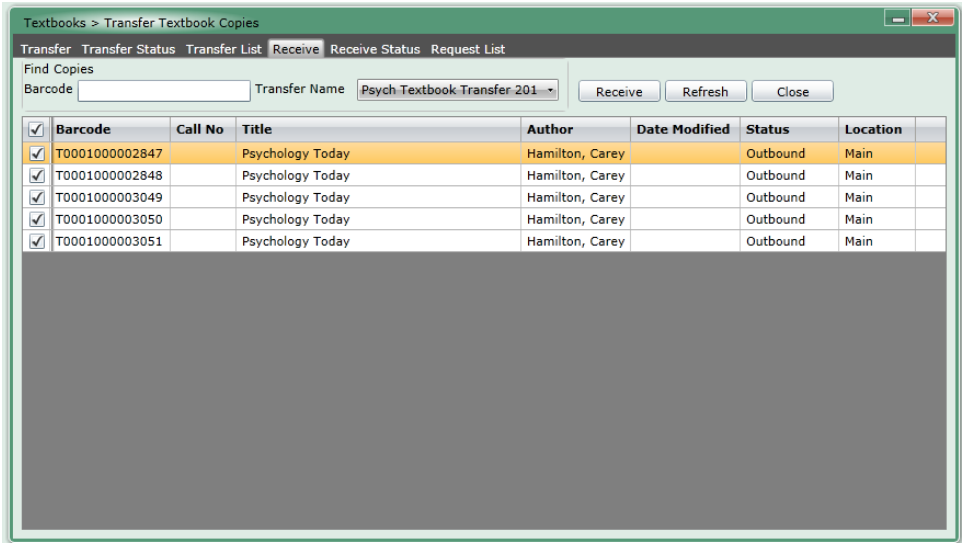
Transfer List

1. Click **Textbook > Site Transfer/Receive.**
2. Click Transfer List tab. Use the following criteria to search for the transfer list:

2.1. The title, the class teacher, the transfer name, the class, the date it was transferred from to the date it was transferred to, Whether or not the textbook was transferred from your current library or transferred to your current library.

3. View the status of the textbooks in the transfer in the grid below including the location, and whether or not the transfer has been accepted.
4. View the library where the transfer is from and where the transfer is going to, as well as the new circulation type and location set in the copy information.



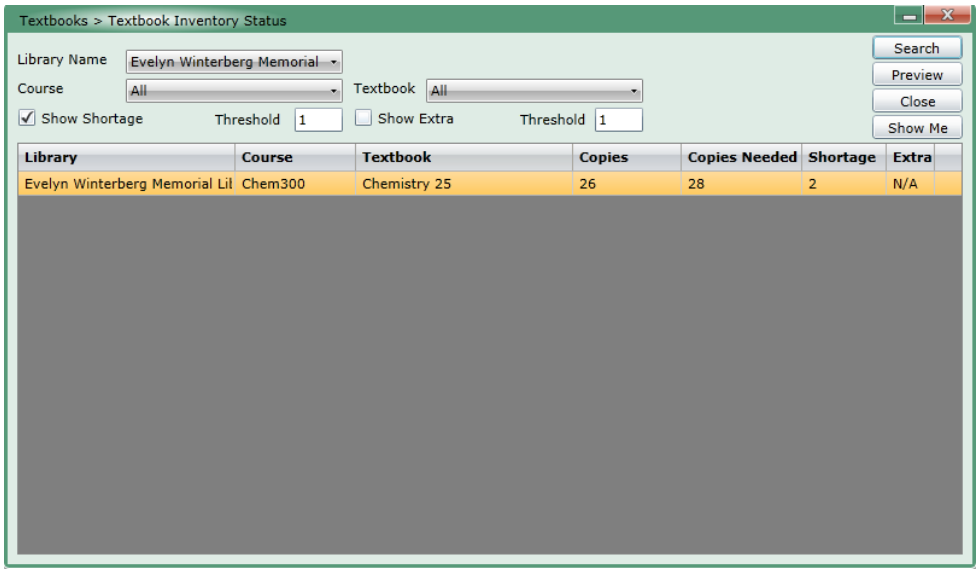


Inventory Status

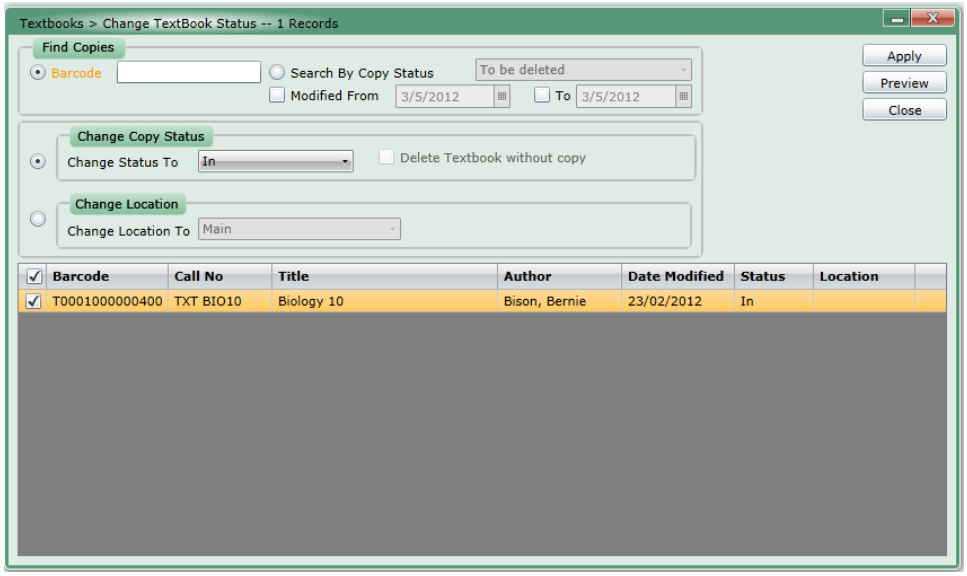
The Textbook Inventory Status feature displays the shortages and overages of textbooks based on class enrollment. This feature requires imported student schedule data.

1. Click **Textbooks > Textbook Inventory Status.**
2. Select Library Name.
3. Select the Course.
4. Select the Textbook
5. Select the Show Shortage and/or Show Extra checkboxes.

6. Set the Threshold for Shortage and/or Extra. It sets the number of textbooks in the ratio of the number of textbooks needed per patron in a class.
7. Click Search.



Change Status



1. Click **Textbook > Change Status.**
2. Scan in the barcodes or select the copy status to be searched.
3. Checkmark the titles to be changed.
4. Select the new status in the dropdown box.
5. The status of these items can be changed to Destroy. Once the status is set to Destroy, the program will prompt you if you would like to delete these items.
6. The textbook location can also be changed by selecting Change location.
7. Click Apply.

Statistics

The Textbook Statistics module is a multi-tab window that provides analysis to ensure textbooks are being efficiently used. To view the textbook analysis window click **Textbooks > Statistics.**

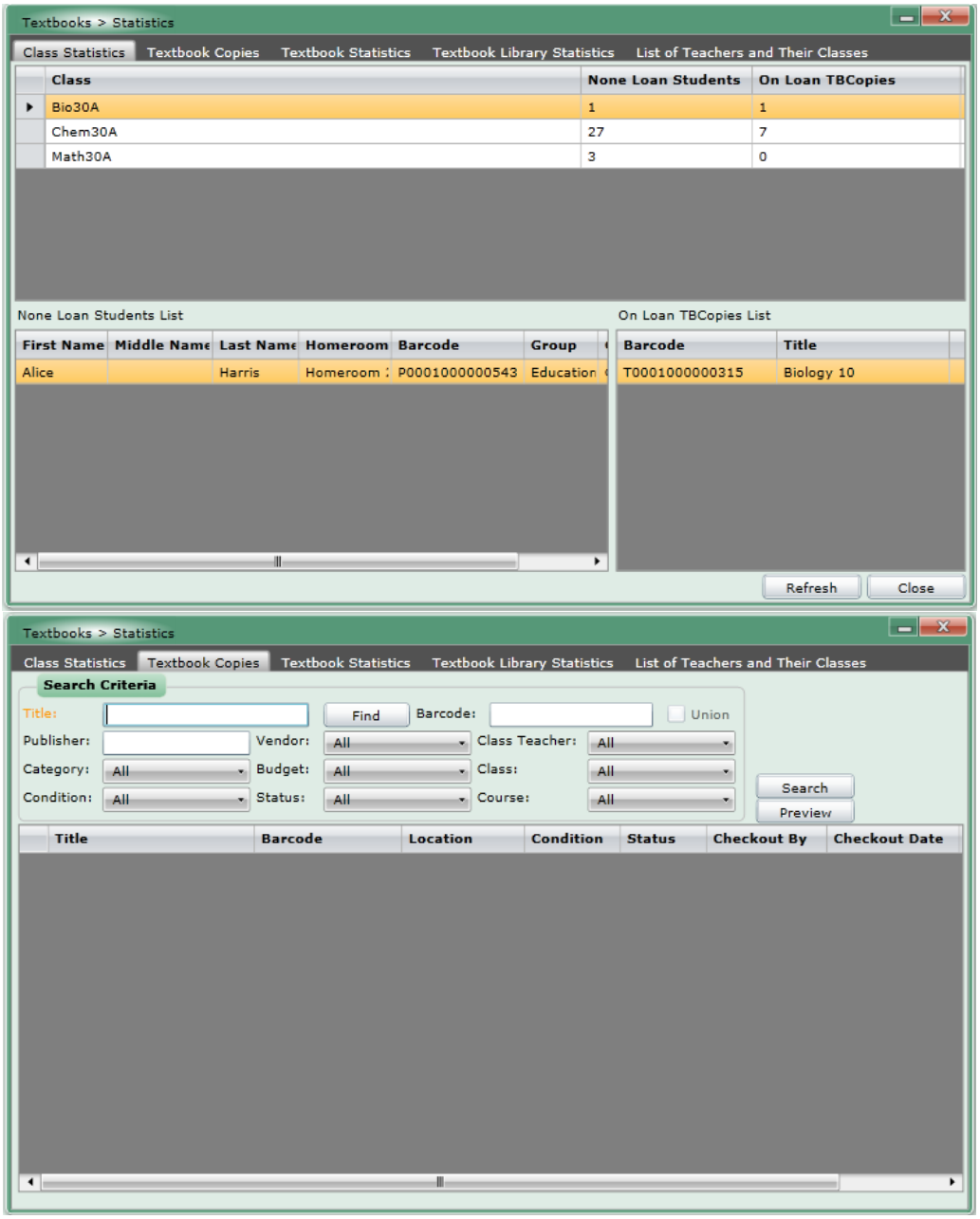
Statistics Tabs

Class Statistics

This window displays imported classes, the number of textbook copies borrowed by students, and the number of students who do not have a textbook checked out yet. Once a class from the list is selected, the bottom left grid will show the students who currently have not checked out a textbook for that course yet. The right hand grid will display the barcodes of the textbooks and titles that are checked out.

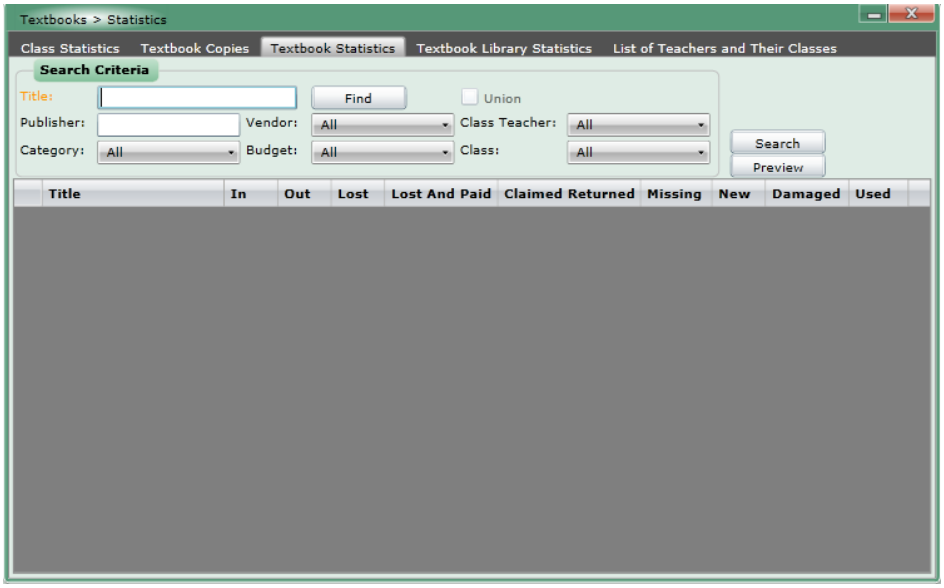
Textbook Copies

Use this window to bring up a list of Textbook copies by a variety of search criteria such as: Publisher, Vendor, Category, Budget, Condition, Status, Class, Class teacher and course. It lists information such as Title, Barcode, Location, Condition, Status, Checked out by, and checkout date in the bottom grid. To print this information, click Preview.



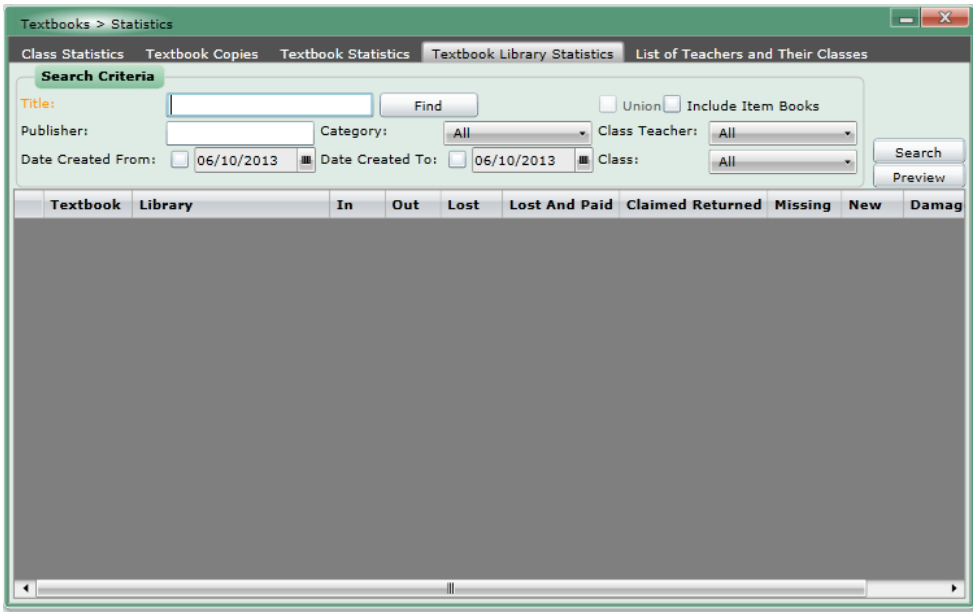
Textbook Statistics

Search by Title, Publisher, Vendor, Category, Budget, Class teacher and Class to get a list of Textbooks to view their circulation statistics. The bottom grid will list each title that meets your criteria and give you the following statistics: In, Out, Lost, Lost and Paid, Claimed Returned, Missing, New, Damaged and Used. Clicking Preview on this window enables printing.



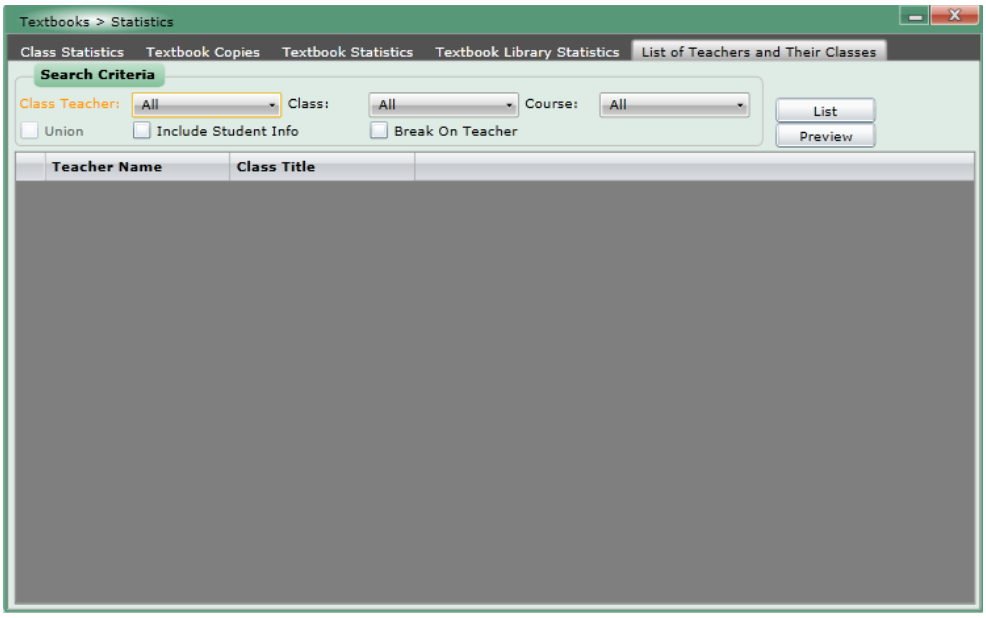
Textbook Library Statistics

This window is a union based feature. It will list all libraries that have items that meet the search criteria and provide the information; Library, In, Out, Lost, Lost and Paid, Claimed Returned, Missing, New, Damaged, and Used. By selecting the Include item books checkbox regular items can be included in the statistics.



List of Teachers and Their Classes

Select a Class Teacher, Class or Course, and search either the district or local library to generate a list of Teachers and Class Titles the teachers currently have.


Textbooks > Statistics
Class Statistics
Textbook Copies
Textbook Statistics
Textbook Library Statistics
List of Teachers and Their Classes
Search Criteria
Class Teacher:
All
Class:
All
Course:
All
Union
Include Student Info
Break On Teacher
List
Preview
Teacher Name
Class Title

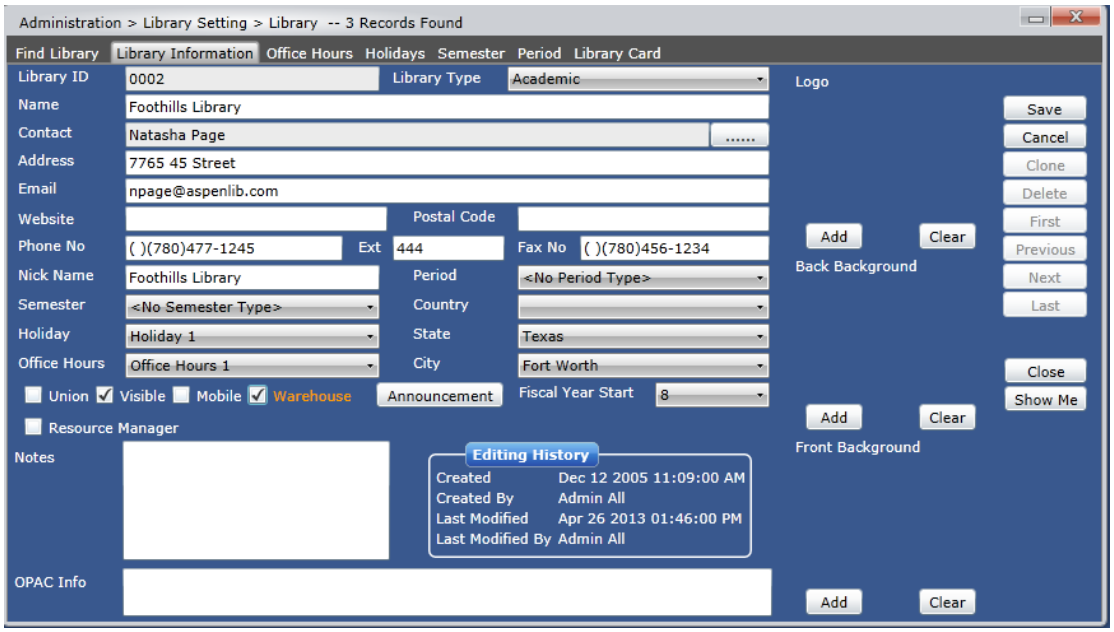
Request/Transfer

This tool provides more extensive textbook transfer options, such as the ability to save data such as copies that need to be shipped. This tool transfers textbook materials not only from school (or library site) to warehouse but also has the capability to transfer textbook materials from school to school. The following headings outline the steps involved in the warehouse transfer process and how the textbook warehouse tabs contribute to that process.

Select a School as a Warehouse

Please login as the school which will become the warehouse before following these instructions. A school needs to be set up as a warehouse one time before creating any warehouse transfers. Or if a different school becomes the new warehouse, please follow these instructions:

1. Click **Administration > Library Setting > Library Information.**
2. Search for the school that will become the warehouse.
3. Double-click the site name or click once and click Detail.
4. Click Edit and then click the Warehouse checkbox.
5. Click Save.



Request/Transfer Scenarios

In these instructions, site 0001 will serve as an example of a warehouse and site 0002 will serve as an example of a school. Each step will be preceded by two scenarios which will involve different sites logging into the ILS:

Scenario 1: The school (site 0002) requests and receives textbooks from the warehouse (site 0001).

Scenario 2: The warehouse (site 0001) requests and receives textbooks from a school (site 0002) that has extra textbooks, for example.

Request

In this tab, a request can be created, modified, saved, and then sent to the other site. After a request becomes sent, it cannot be modified.

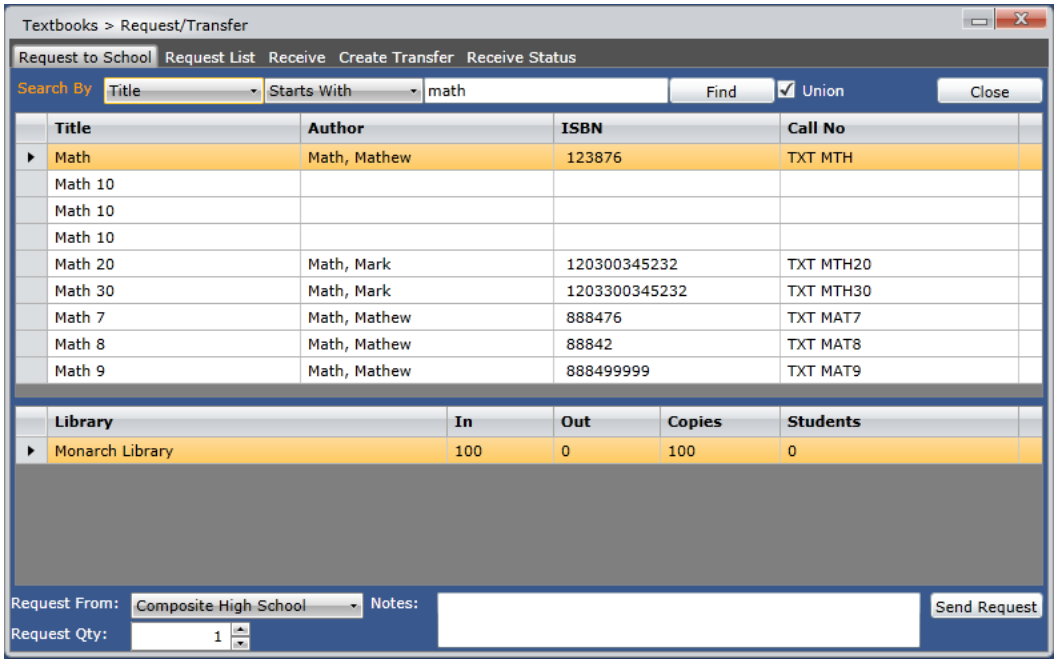
Scenario 1:Site 0002 logs in and sends the request to site 0001.

Scenario 2:Site 0001 logs in and sends the request to site 0002.

Send Request

Search for titles in a new request and then send the request.

1. Click **Textbook > Request/Transfer.**
2. Use the Search By criteria to search for textbook titles. Click Union to search district-wide.
3. Select the textbook title you wish to request from the top grid.
4. In the bottom grid, select the local library with its respective textbook copy count to make a request.
5. Select the library name from the Request From dropdown and select the number of copies from the Request Quantity from the numeric textbox.
6. If necessary, add notes for the request in the textbox. Click Send Request.



Request List

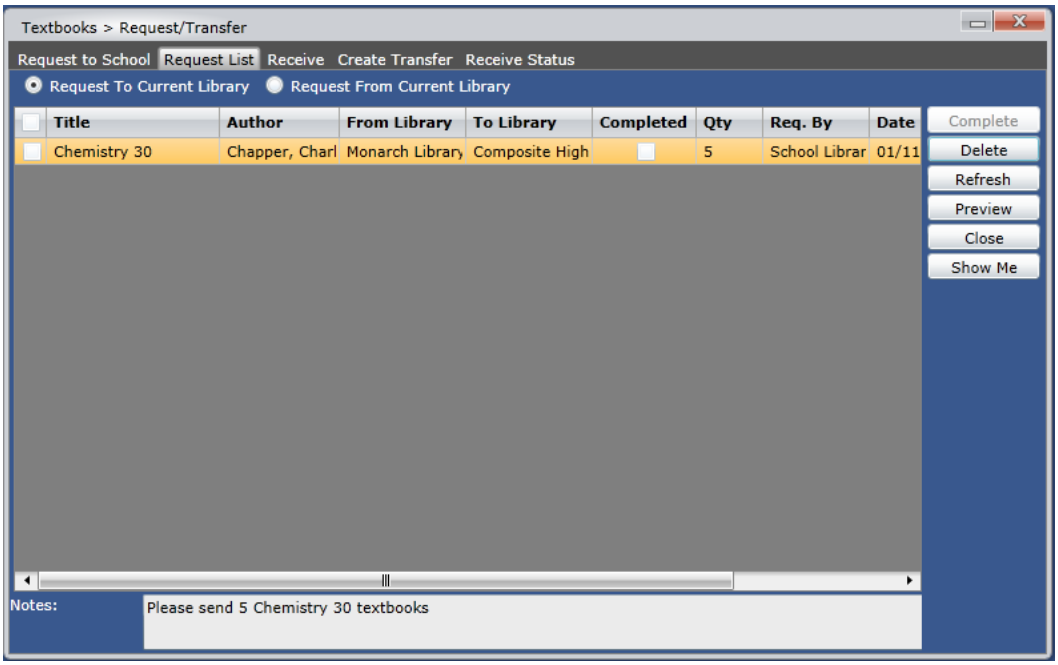
Find a history of textbook Request/Transfers by using the criteria in this window. The list of textbooks in the request can also be reviewed.

Scenario 1:Site 0002 logs in and sees the history of their requests sent to site 0001.

Scenario 2:Site 0001 logs in and sees the history of their requests sent to site 0002.

Complete

1. Click **Textbook > Request/Transfer.**
2. Click the Request List tab.
3. Select “Request To Current Library” to see requests from other libraries. “Request From Current Library” keeps track of requests sent from the current library.
4. View the barcodes listed in the grid below.
5. See the title requested, author, the library where it will be transferred, whether or not the transfer was completed, the quantity requested, who requested it, the date of when the title was requested, and the date the request was completed.
6. Complete a request, by selecting the record and clicking "Complete".



Create Transfer

Requests can become saved, removed, and shipped from the Transfer tab. Notifications for transfers will show after a request becomes sent from the other site.

Scenario 1:Site 0001 logs in and transfers textbooks to site 0002.

Scenario 2:Site 0002 logs in and transfers textbooks to site 0001.

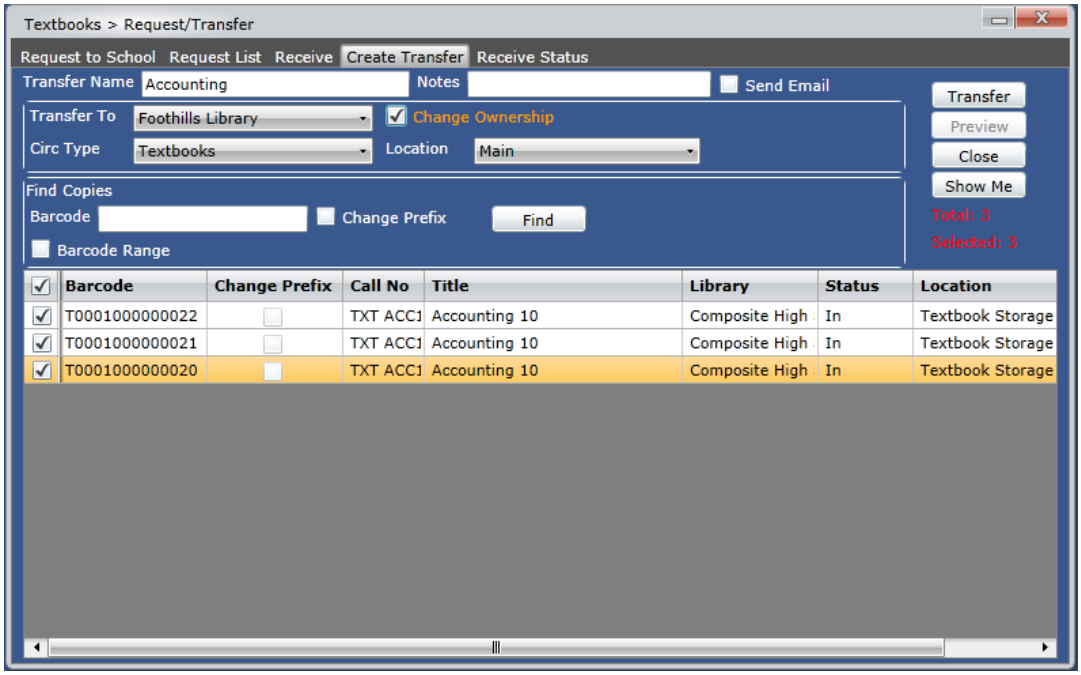
Transfer

Transfer all of the textbooks to another site. After clicking Transfer, details for the shipment cannot be modified.

1. Click **Textbook > Request/Transfer.**
2. Click the Transfer tab.
3. Specify which library the textbooks will be transferred to, circulation type, and location.

Note: See if any other school has made a request for textbooks by clicking the Request List tab.

4. Check the box if the library will become in the new owner (meaning the textbooks will not be returned).
5. Give a name to the transfer.
6. Enter any or all of these additional options if necessary:
   - 6.1. Add notes to the transfer.
   - 6.2. Select the change prefix checkbox to change the prefix to the one used by the local library receiving the textbook.
   - 6.3. Select the Change Ownership checkbox to change the owning school to the one receiving the textbook.
   - 6.4. Select "Send E-mail" to notify the school that will receive the transfer.
7. Scan the barcodes to be shipped from the physical barcode on the textbook. If the physical barcode is not available, please look up the barcode to ship in Find/Add Textbook.
8. Remove barcodes that will transfer by deselecting the checkboxes.
9. Click Transfer to complete the shipment.



Receive

Receive textbook transfers from the warehouse within the district. Changes to circulation types, location, and textbook barcodes can be made conveniently from this tab. However, these changes can also be made after receiving a shipment as well. A notification will show that the transfer has already been sent and that the textbooks are ready to be received.

Scenario 1: Site 0002 logs in and receives textbooks from site 0001.

Scenario 2: Site 0001 logs in and receives textbooks from site 0002.

Apply

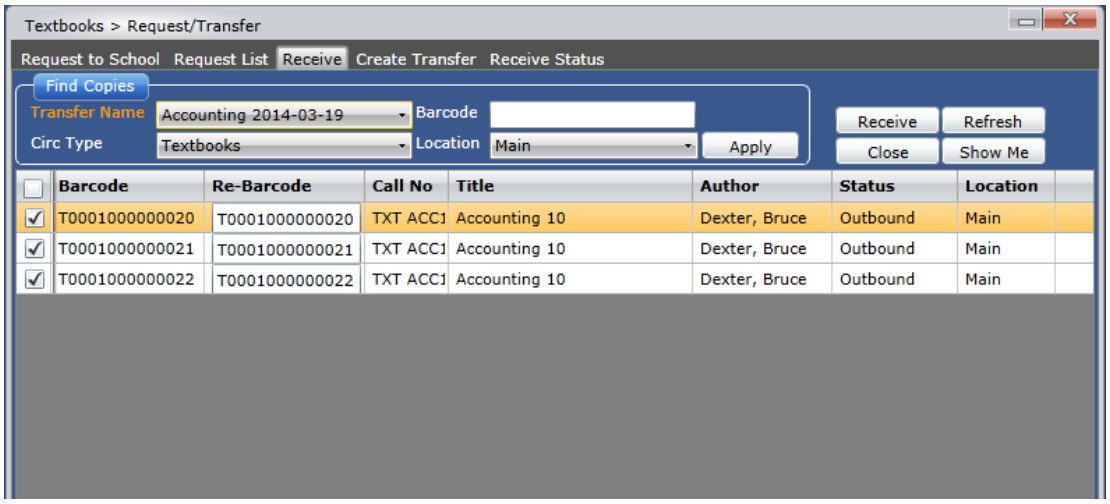
Apply any changes necessary before receiving textbooks at the site.

1. Click **Textbook > Request/Transfer.**
2. Select the Receive tab.
3. Use dropdowns to select a Transfer Name.
4. Modify the circulation type, and location by selecting them in the dropdowns, if necessary.
5. Select the barcode under the re-barcode column in the textbox beside the barcode (see screenshot) and then scan the new textbook barcode, if necessary..
6. Make any changes to the criteria in steps 3-4, click Apply.

Receive

Receive any textbooks after applying all desired changes.

1. Click **Textbook > Request/Transfer.**
2. Select the Receive tab.
3. Follow steps 3-5 to make any final changes and click Apply before receiving the shipment.
4. Select all of the copy checkboxes and click Receive.



Receive Status

View textbook transfers that may or may not have yet been received.

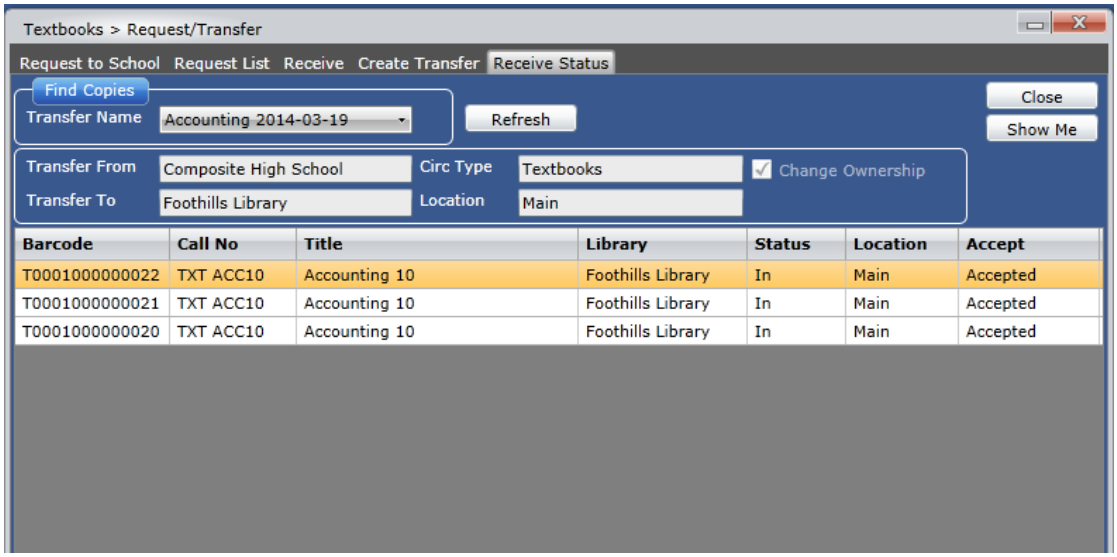
Scenario 1: Site 0002 logs in and checks what they accepted from site 0001.

Scenario 2: Site 0001 logs in and checks what they accepted from site 0002.

Find Copies

Find copies that the site may or may not have received yet.

1. Click **Textbook > Request/Transfer.**
2. Select the Receive Status tab.
3. Use the Transfer Name dropdown to find copies.
4. See the criteria that was changed in the transfer in the top of the window (see screenshot):
   Transfer From: shows the site that sent the transfer and the associated circ type and location.
   Transfer To: shows the site that received the transfer and the associated circ type and location.
5. View whether or not the transfer has been accepted to the new location in the Accept column.
6. If the ownership changed, you will see the “Change Ownership” checkbox selected.



Assets Module

Asset tracking allows staff to trace assets in the school, such as assets including audio-visual equipment, kits, rooms, computers, calculator etc.

Assets

Insignia Library System allows staff to keep track of additional resources, such as assets, rooms, and kits. Detailed information about assets, including reoccurring maintenance schedules can be recorded in this module. Booking information to these resources can be updated and tracked according to blocks, time periods, or a weekly schedule. Assets module includes:

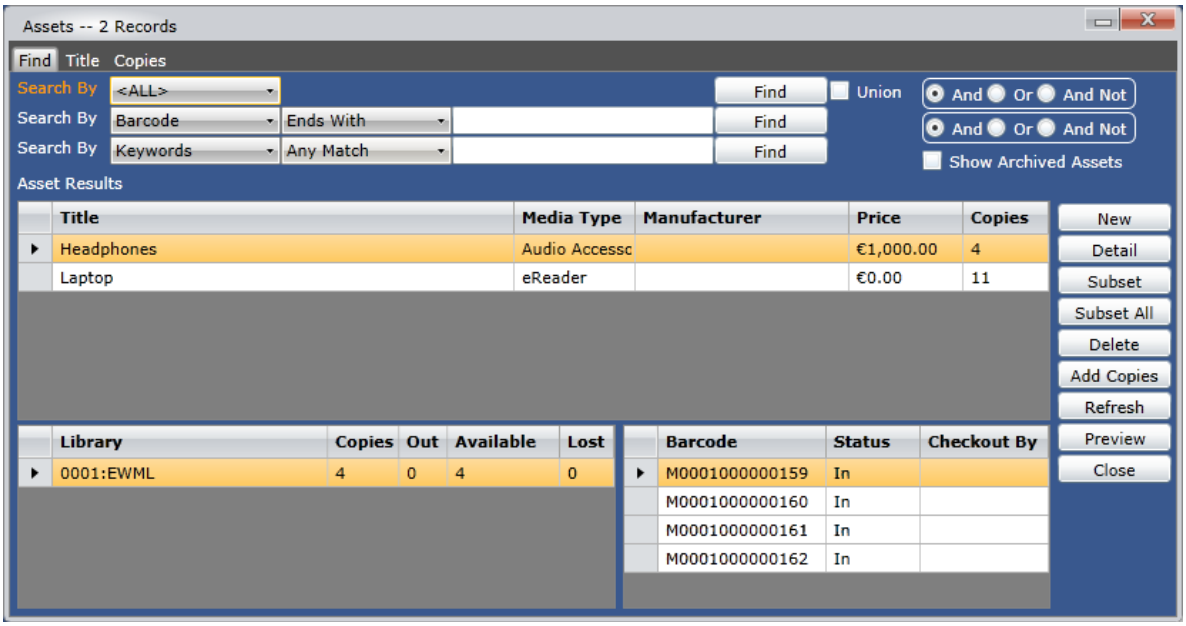
1. Find / Add Asset
2. Find / Add Room
3. Site Transfer/Receive
4. Check In
5. Check Out
6. Barcode
7. Copy Subset
8. Reserve List
9. Booking
10. Booking List

Find/Add Asset

Open the Find/ Add Assets window under Assets to search and add Assets.

Find

1. Click **Assets > Find/Add Assets.**
2. Search for the textbook by any of the available parameters including keyword.
    2.1. When searching by barcode, only the holding with that barcode will be returned in the search. Barcodes can be searched by the following criteria: “Starts With”, “Exact Match”, and “Ends With”.
        2.1.1. To use the “Ends With” search, please see the Catalog Configuration’s Barcode Format Section and make sure that “Copy Quick Barcode” is checked.
        2.1.2. To see the inventory for entire district select the Union checkbox.
3. Enter search criteria and click Find. The ALL option from the initial dropdown menu will display all assets.
4. Inventory status for each school is given in the bottom grid.
5. To view detailed information about a specific item, select the item and click Detail.
6. The Interlibrary Loan box is available in the Detail screen. Select the checkbox to allow interlibrary loans of Assets in the district.



New

1. Click **Assets > Find/Add Assets.**
2. Click New.
3. Under the title tab, enter all the textbook title.
4. Enter all relevant information including the model, price, and manufacturer.
5. Enter any special instructions applying to the title.
6. Select the Media Type from the dropdown. Modify it in the Parameters menu.
7. View the Editing History at the button for information on who created and edited the textbook title. This information can become important when several sites with its own respective textbook copies share one title record in one site for the whole district.
8. Click Save. Follow the next section to Add Copies.

Add Copies

1. Click **Assets > Find/Add Assets.**
2. Select the title and/or double click to go into the Title tab.
3. Click Add Copies
4. Enter the number of assets to be added.
5. Specify the barcode(s) or allow the system to generate the barcode(s). When adding more than one copy, the Set Barcode screen will appear with these options, on how to generate barcodes:
   5.1. Generate Automatically.
   5.2. Successive Barcodes Start From: Adding from a given number.
   5.3. Set Barcode Individually: Specify each barcode to be added.
6. Enter the price and circ type
7. Enter the serial number and notes, if applicable.
8. Optionally, setup a specific maintenance schedule for each copy that is entered.
9. Click Save.

Apply Multicopies

The Apply Multicopies button can be used to set values for all textbook copies for this title. These fields are Price, Replacement Cost, Vendor, Circulation Type and Call Number.

1. Click **Assets > Find/Add Assets.**
2. Search for the title.

3. Select the title.
4. Click the Copies tab.
5. Click Apply Multicopies.
6. Checkmark the values that will be changed and enter the new value.
7. Check the apply to union checkbox if you want to change those values for all the copies in the District.
8. Click the Ok button to save changes.

Delete

1. Click **Assets > Find/Add Assets.**
2. Enter search criteria and click Find. The ALL option from the initial dropdown menu will display all assets.
3. Select the assets to delete.
4. Click Delete.
5. Confirm deletion.

Unarchive

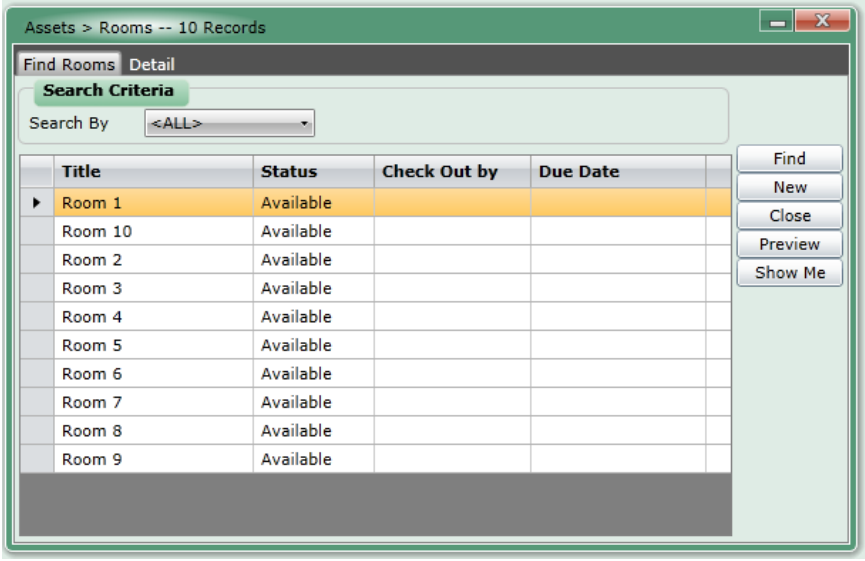
1. Click **Assets > Find/Add Assets.**
2. Enter search criteria, click the checkbox "Show Archived Assets" and click Find. The ALL option from the initial dropdown menu will display all assets.
3. Select the assets to unarchive
4. Click Unarchive.
5. Confirm the unarchive.
6. Alternatively, click Delete to delete the item completely.
7. Confirm deletion.

Find/Add Rooms{ XE "Find/Add Rooms"}

Rooms can be added into the library system with their room capacity. The system tracks usage using assets circulation features.

Find{ XE "Find/Add Rooms:Find"}

1. Click **Assets > Find/Add Room.**
2. Enter search criteria.
3. Click Find.
4. To view detailed information about a room, select the item and click the Detail tab.



New

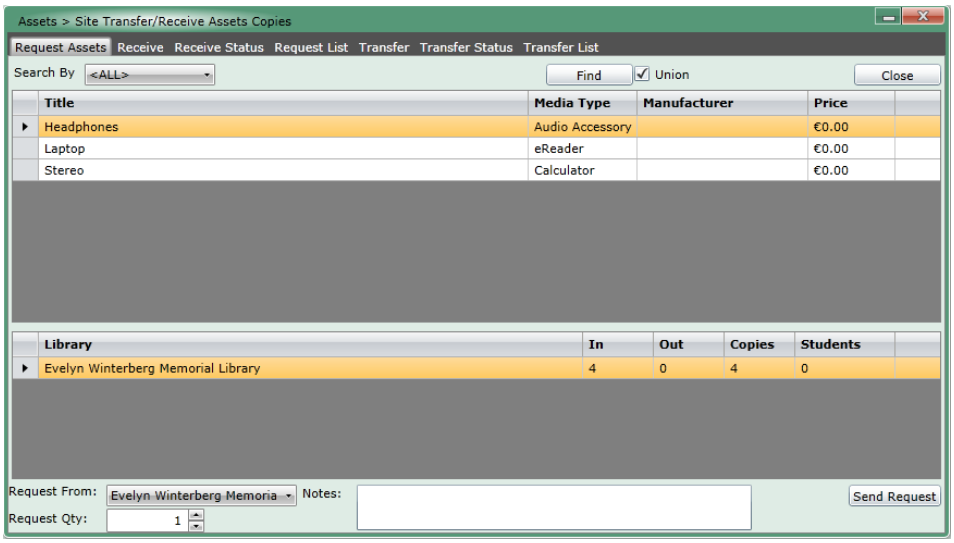
1. Click **Assets > Find/Add Room.**
2. Click New.
3. Enter the information for the new room including:
   3.1. Check Out Date and Time and Due Date and Time.
   3.2. The room capacity in square feet.
   3.3. The circulation type.
   3.4. Comments
4. Click Save.

Delete

1. Click **Assets > Find/Add Room.**
2. Enter search criteria and click Find.
3. Select the room to be deleted.
4. Click Delete.
5. Confirm deletion.

Site Transfer/Receive

The Site Transfer/Receive feature in Assets is similar to the Site Transfer/Receive window in the Textbook Module. It enables staff to transfer Assets from one school to another in the District. This feature enables transfer and packing slips to be created as well as the ability to receive assets and send assets requests.



Request Assets

1. Click **Assets > Site Transfer/Receive.**
2. Use the Search By criteria to search for asset titles. Click Union to search district-wide.
3. Select the asset title you wish to request from the top grid.
4. In the bottom grid, select the local library with its respective asset copy count to make a request.
5. Select the library name from the Request From dropdown and select the number of copies from the Request Quantity from the numeric textbox.
6. If necessary, add notes for the request in the textbox. Click Send Request.

Receive

1. Click **Assets > Site Transfer/Receive.**
2. Click Receive tab.
3. Select the transfer from the dropdown.
4. Either scan the barcode to receive them or select the top checkbox to select all assets and click Receive.
5. See what has been received by clicking the Receive Status tab and selecting the Transfer Name from the drop down menu.
6. See if assets have been transferred the other school by clicking the Transfer Status tab and pick a transfer from the dropdown.

Receive Status

1. Click **Assets > Site Transfer/Receive.**
2. Click Receive Status tab.
3. View the barcodes listed in the grid below.
4. View the library it's transferred from, the library it's being transferred to as well as the circulation type it will become, and its new location.

Request List

1. Click **Assets > Site Transfer/Receive.**
2. Click Request List tab.
3. View the barcodes listed in the grid below.
4. See the title requested, author, the library where it will be transferred, whether or not the transfer was completed, the quantity requested, who requested it, the date of when the title was requested, and the date the request was completed.
5. Complete a request, by selecting the record and clicking "Complete".

Transfer

1. Click **Assets > Site Transfer/Receive.**
2. Click Transfer tab. See what transfers have been created by looking at the grid below.
3. Specify which library the assets will be transferred to, circulation type, and location.

Note: See if any other school has made a request for assets by clicking the Request List tab.

4. Check the box if the library will become in the new owner (meaning the assets will not be returned).
5. Give a name to the transfer.
6. Select Send Notification, if needed.
7. Scan all barcodes to be transferred.
   7.1. To send a range of barcodes, check the Barcode range.
8. Click Transfer.

Transfer Status

1. Click **Assets > Site Transfer/Receive.**
2. Click Transfer Status tab. Select the transfer name from the dropdown.
3. View the status of the assets in the transfer in the grid below including the location, and whether or not the transfer has been accepted.
4. View the library where the transfer is from and where the transfer is going to, as well as the new circulation type and location set in the copy information.

Transfer List

1. Click **Assets > Site Transfer/Receive.**
2. Click Transfer List tab. Use the following criteria to search for the transfer list:
   2.1. The title, the class teacher, the transfer name, the class, the date it was transferred from to the date it was transferred to, Whether or not the asset was transferred from your current library or transferred to your current library.
3. View the status of the assets in the transfer in the grid below including the location, and whether or not the transfer has been accepted.
4. View the library where the transfer is from and where the transfer is going to, as well as the new circulation type and location set in the copy information.

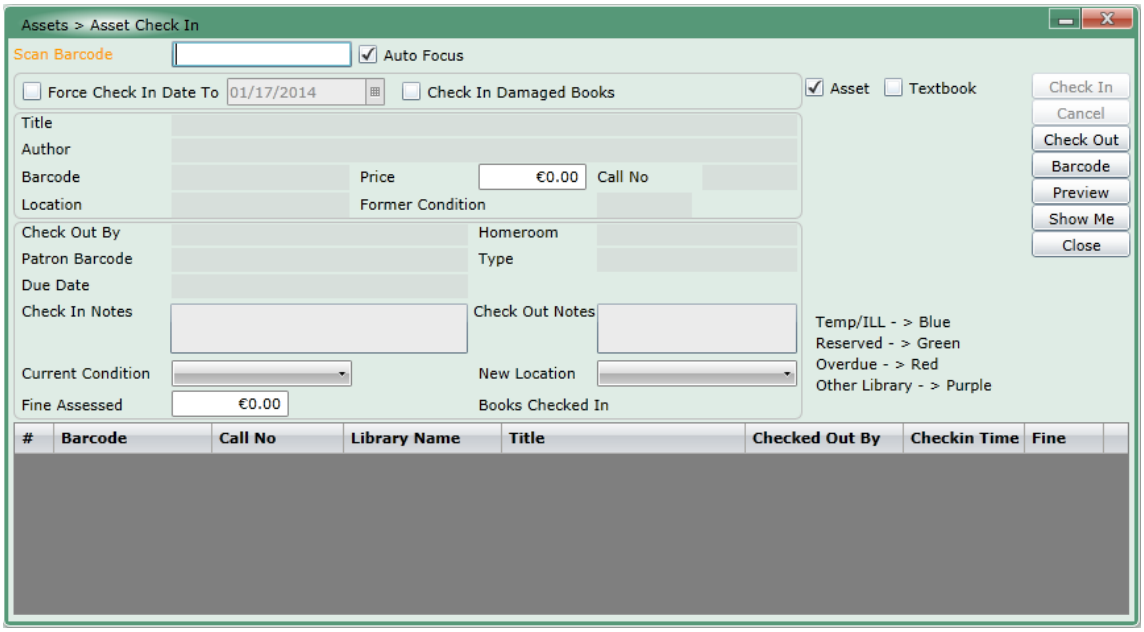
Check In

The check in feature in Assets is similar to the Check In in the Circulation Module. This interface allows the user can check in assets. During check in, the user can also specify fine for damaged assets or reset checkin date.

1. Click **Assets > Check In.**
2. Scan in assets of Assets to check them in (repeat for multiple Assets).

Tip: If barcode is missing select the Browse button denoted by the (…), find the asset and click Check In.

Assets, notes, and library names checked in appear in different colors.
Red: asset is overdue or asset has check in notes
Green: asset is on reserve
Purple: asset is from another library branch
Blue: asset is a Temporary or Interlibrary loan items
Tip: If an asset is on reserve, a message will confirm that. If a fine has been accumulating including overdues, it will show on the bottom left hand corner for the book checked in.



Force Check In Date to

In the ILS, the check in date can be changed. This feature is useful in the event of an interruption in library service and library books are unable to be returned resulting in fines. This is also useful in discharging a book drop.

1. Select the Force Check In Date to checkbox.
2. Type in the date in the date field or click the calendar icon to select a date from the calendar.
3. Scan the barcode or click ... to search for the item.
4. Until this window closes or the check box deselects, all assets will be checked in as if they were returned on the date specified.

Check In Damaged Books

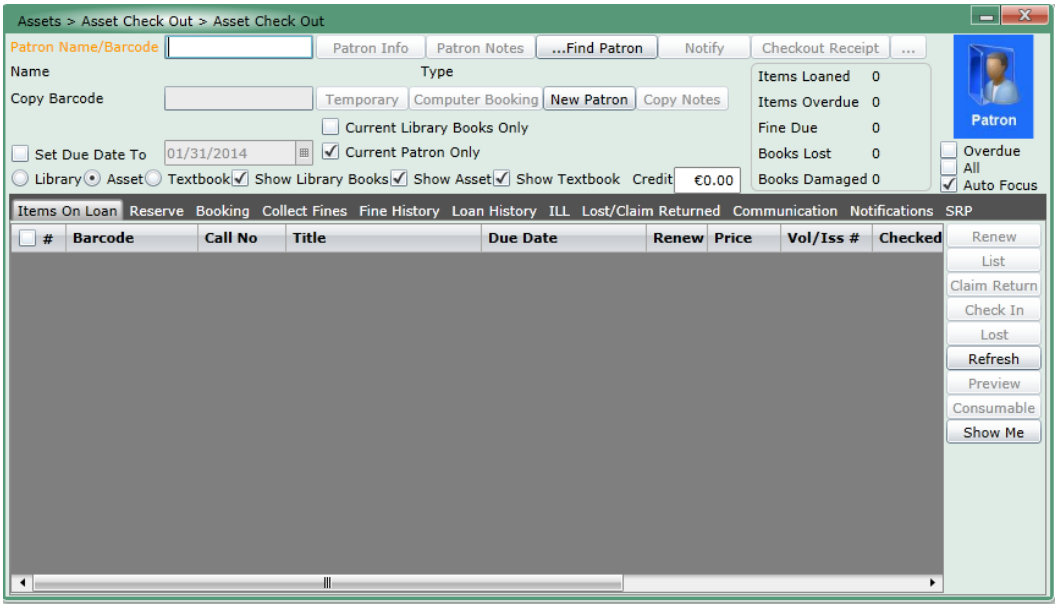
Assign fines to patrons for damages.

1. Select Check In Damaged Books checkbox.
2. Scan barcode or click ... to search for the item.
3. Specify the condition, fine, location and comments.
4. Click Check In.

Check Out

Assets can be checked out using the **Circulation > Checkout** feature by selecting the Asset radio button. Additionally, assets can be checked out in the assets module. For a comprehensive listing of check out fields and other features, please see the Circulation Module for Checkout Items.

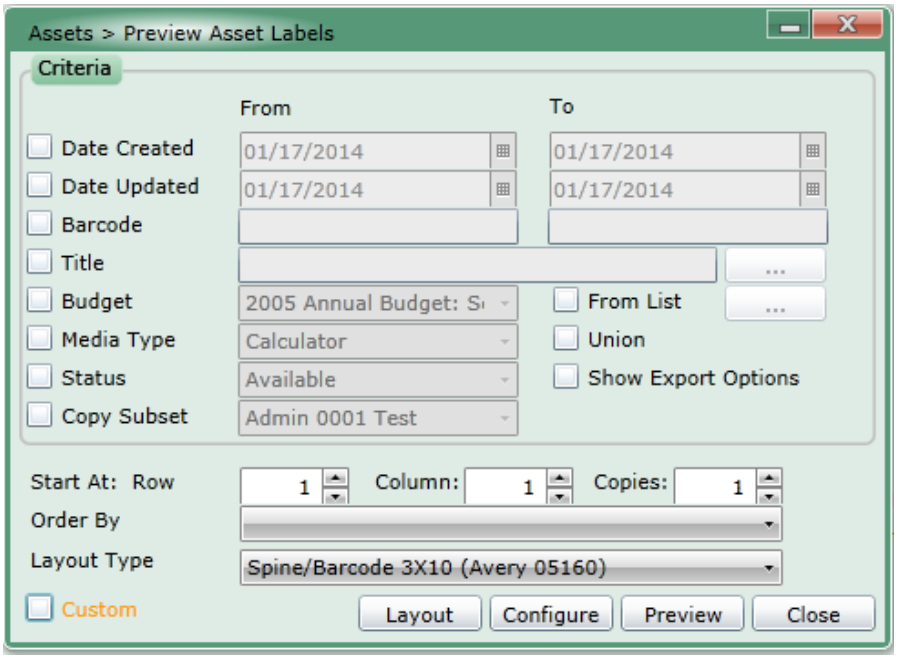
1. Click **Assets > Checkout**.
2. Scan in the patron or look them up by clicking on the Find Patron button.
3. Scan the Asset barcode.
4. Repeat step #3 to check out other textbooks.
5. Click Checkout.



Barcode

Staff can print assets barcodes in a variety of layouts.

1. Click **Assets > Barcode**.
2. Find the asset to print barcodes for by choosing from the listed criteria. Options for criteria are:
   2.1. Date created
   2.2. Date updated
   2.3. Barcode range
   2.4. Title
   2.5. Budget
   2.6. Media Type
   2.7. Status
   2.8. Copy Subset
   2.9. From list (a list of scanned barcodes)
3. Select the Order By dropdown menu to select order preference.
4. Select the Layout Type by clicking the Layout button.
5. Select Preview to display the barcodes to print in the window.
6. Click Preview.
7. The barcode report can save to a different file type by selecting Show Export Options. These options exist in print preview.
8. Click the printer icon to bring up the printer selection window.
9. On the printer selection window, you need to make sure to set the following settings for your barcodes to line up correctly:
   9.1. **Page scaling**: Needs to be set to **none.**
   9.2. **Auto Rotate and Center:** needs to be **unchecked**.
   9.3. Then click OK to send the barcodes to the selected printer.



Copy Subset

The Copy Subset feature in Assets is similar to the Copy Subset feature in the Catalog Module. Copy Subsets are like item subsets but refer to copies not item records.

1. Click **Assets > Copy Subset**.
2. Use the radio button Search and then specify the criteria and click Find to locate the copies for the subset.
3. Use the radio button Scan Barcodes to scan all of your Copy Subset into a list.
4. To select multiple records in the grid, click the first record and hold down Ctrl, while selecting the copies for the subset.
5. Click Subset.
6. To include all the copies displayed in the grid, click Subset All.

Tip: Copy subsets can be used in printing barcode/spine labels.

Reserve List

The Reserve List feature in Assets is similar to the Reserve List feature in the Circulation Module. The Reserve List displays the all of the reserves for specific dates. Reserves can also be reordered and deleted from this window.

Search

1. Click Assets > Reserve List.
2. Select by reserve date, available date, or show all.
3. Select a date range.
4. Limit by grade or homeroom if needed.
5. Then click Search.

Move Up/Move Down

1. Click Assets > Reserve List.
2. Click the reserve record to change.
3. Click Order.
4. Click the reserve record to order.

5. Use the Move up and Move down buttons to reorder selected reserve.

Suspend

Suspend will take the item out of the reserve queue for the reserve temporarily

1. Click **Assets > Reserve List**.
2. Click the left-hand checkbox of the record you will suspend.
3. Click Suspend to temporarily remove item from the reserve queue.
4. Suspended items will show in red on the reserve list.

Resume

Resume will put the item back in the same place in the reserve queue before clicking Suspend.

1. Click **Assets > Reserve List**.
2. Click the left-hand checkbox of the record you will resume (items with red text).
3. Click Resume to suspended items back into reserve queue. The text will turn black.

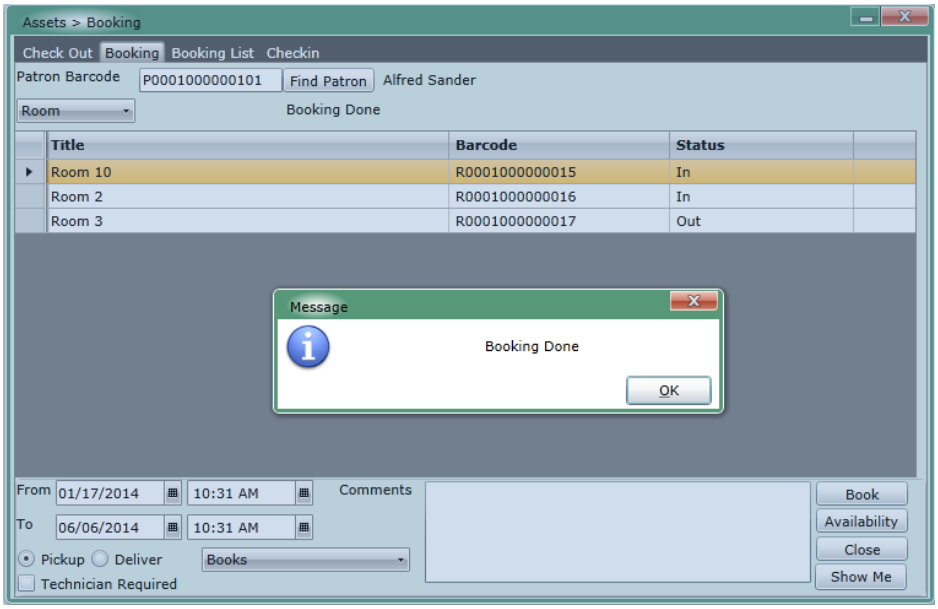
Cancel

1. Click **Assets> Reserve list**.
2. Click the reserve record to cancel.
3. Click Cancel to remove the reserve.

Booking

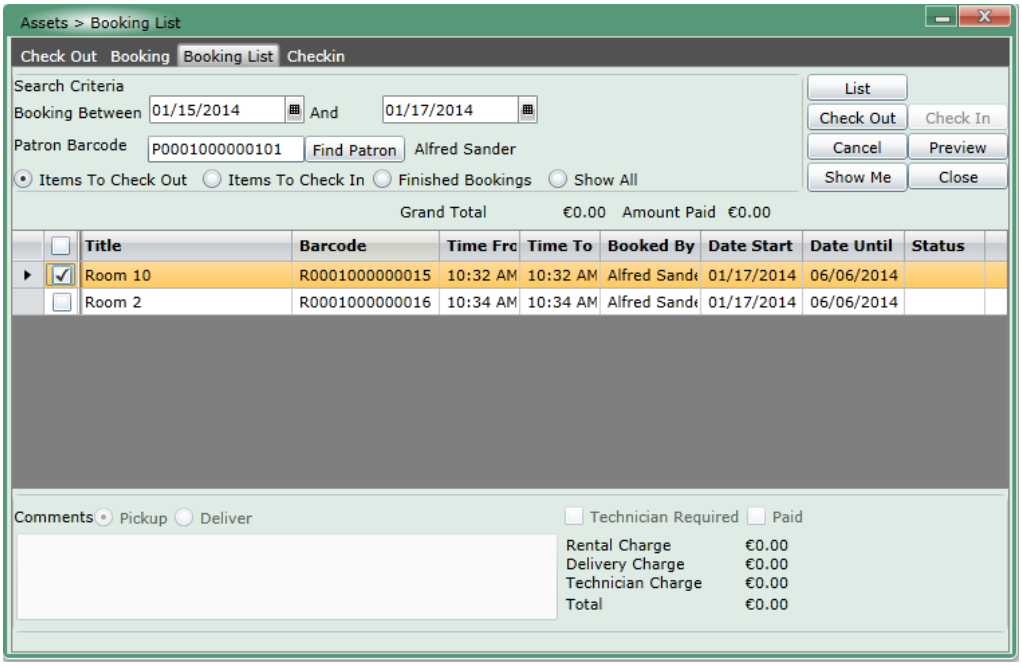
This tab allows patrons to book assets from their local library.

1. Click **Assets > Booking.**
2. Enter the patron.
3. From the results list, select the Room to be booked.
4. Select the time period in the From and To date boxes and time boxes.
5. Add any applicable comments.
6. Click Availability to see if the room is available or not in the caption.
7. Click Book.



Booking List

The booking lists for all patrons or for a specific patron are available within this feature. Additionally, outstanding bookings, checked out bookings, and finished bookings can be viewed.

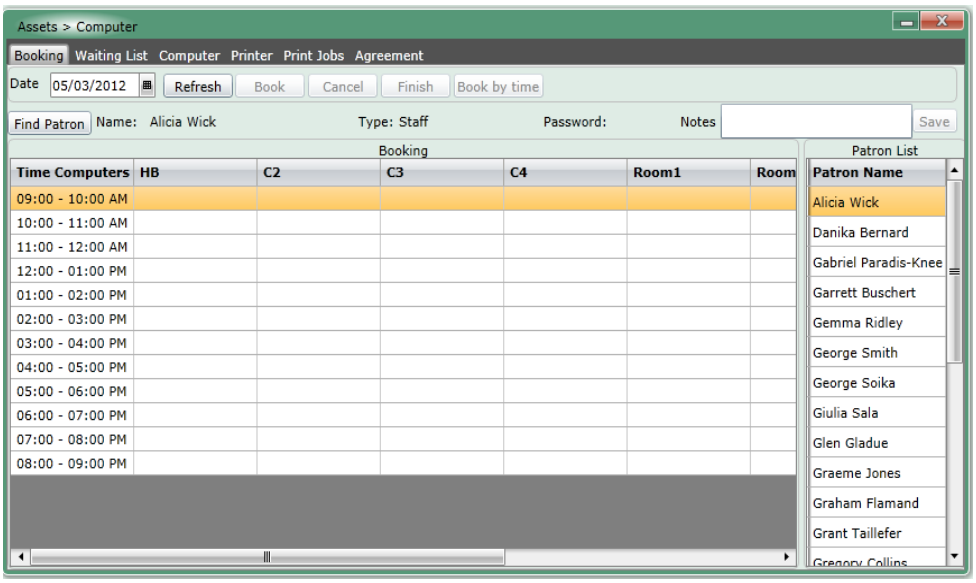


Booking List

1. Click **Assets > Booking List**.
2. Specify a date range, and then select the radio button for Items to Check Out, Items to Check In, Finished bookings, or Show All.
3. Look up the patron's name, if necessary.
4. Click List.
5. If you select the radio button for Items to Check Out, you may click the checkbox beside the item in the grid and click Check Out.
6. If you select the radio button for Items to Check In, you may click the checkbox beside the item in the grid and click Check In.

Computer

Insignia Library System comes with an integrated computer booking module that enables computer tracking. This feature also manages printing from the computer and can link printing charges to patron accounts.



The computer booking feature in the ILS enables public access or patron access computers bookings. This feature allows a computer to be booked for a patron at a specified time for a specific computer station.

Computer Booking

1. Click **Circulation > Check Out > Computer Booking**.
2. Type in the patron's name or barcode in the barcode field.
3. Press Enter.
4. Click **Computer Booking.**
5. Book days in advance by changing the date in the date field or click the calendar icon and change the date by selecting in on a calendar.
6. Select the computer you wish to book from the column above.
7. Select a time frame to book in the displayed grid by clicking on it by the *hour* or by the *half hour*.
8. If you wish to book a time other than on the hour or half hour, click Book by time.
9. Select the time limit.
10. Click OK.
11. If you wish to make a note, use the booking notes on the right-hand side.
12. Click Book.

Cancel

1. Click **Circulation > Check Out. Computer Booking**.
2. Type in the patron's name or barcode in the barcode field.
3. Press Enter.
4. Click **Computer Booking.**
5. Search for the calendar day by clicking the calendar icon and change the date.
6. Select the computer you wish to book from the column above.
7. Click the booking to be cancelled in the grid.
8. Click Cancel.

Set Up Patron Group as Guests

1. Click **Patron >Patron Group**.
2. Click New.

3. Enter the name and security level.
4. Select if the group is a Student, Staff or Other group. This will add a Student ID field in for the student groups and leave it out of the Staff and Other groups.
5. Select the Computer check box if you want this group to appear in the computer booking quick list as guests.

Note: The guest list appears in the right-hand side of the computer booking window.

6. Click Save.

Login as Guest

1. Click **Circulation > Check Out. Computer Booking**.
2. Type in the patron's name or barcode in the barcode field.
3. Press Enter.
4. Click **Computer Booking.**
5. Select the guest's name from the right hand side.
6. Book days in advance by changing the date in the date field or click the calendar icon and change the date by selecting in on a calendar.
7. Select the computer you wish to book from the column above.
8. Select a time frame to book in the displayed grid by clicking on it by the *hour* or by the *half hour*.
9. If you wish to make a note, use the booking notes on the right-hand side.
10. Click Book.

Computer Booking in the OPAC

Computer booking can be set up by patrons (if enabled in the ILS).

1. Go to the library URL.
2. Click the My Account link.
   2.1. Enter login information if prompted.
3. Click the Computer Booking tab.
4. The bookings are listed here.
5. To cancel a booking simply select one of the booked time slots and click Cancel.
6. To make a booking please select a time slot and click the Book button.
7. Click **Administration > Library Setting > Configuration** in the ILS and select the checkbox under the OPAC tab to enable this feature.

Computer Set Up

Insignia Library System comes with an integrated computer booking module that enables computer tracking. This feature also manages printing from the computer and can link printing charges to patron accounts.

1. Click **Assets > Computer**.
2. Click the Computer tab.
3. Click Add.
4. Add the computer information to the next line available.
5. Select the check box to make the computer available for use.
6. Continue to add computers.
7. Click Save.

Computer Waiting List

The Computer Booking Waiting List maintains a list of patrons in the library who would like to use a computer when all stations are in use. Patrons are listed in the order that they arrive. The next available station is automatically assigned to the next patron on the list.

Agreement

1. Click **Assets > Computer**.
2. Select the Agreement tab.
3. To edit, click Edit, make changes and click Save.

Printer and Print Jobs

The computer booking feature also provides print management. Printers can be added to the ILS system and printing fees calculated on patron's accounts.

Printer

1. Click **Assets > Computer**.
2. Select the Printer tab.
3. Click Add.
4. Enter the printer information.
5. Click Save.

Print Jobs

1. Click **Assets > Computer**.
2. Select the Print Jobs tab.
3. Enter the dates of the print jobs.
4. Optionally, select the computer.
5. Click Search.

Acquisitions Module

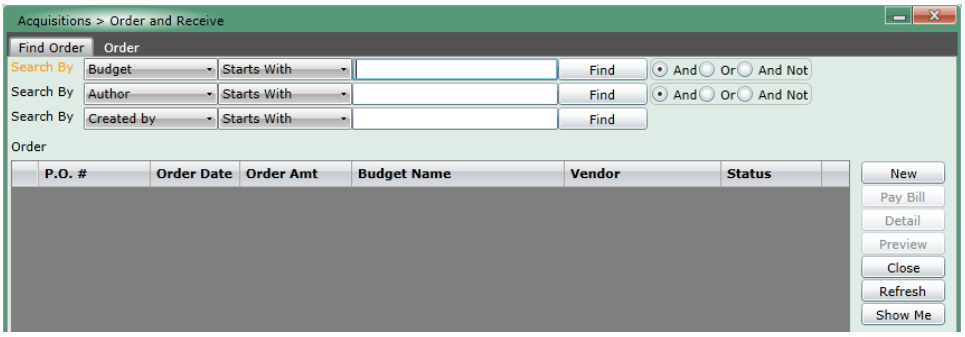
Insignia Library System (ILS) comes with a fully integrated Acquisitions Module. This module provides the ability to manage budgets and track purchases.

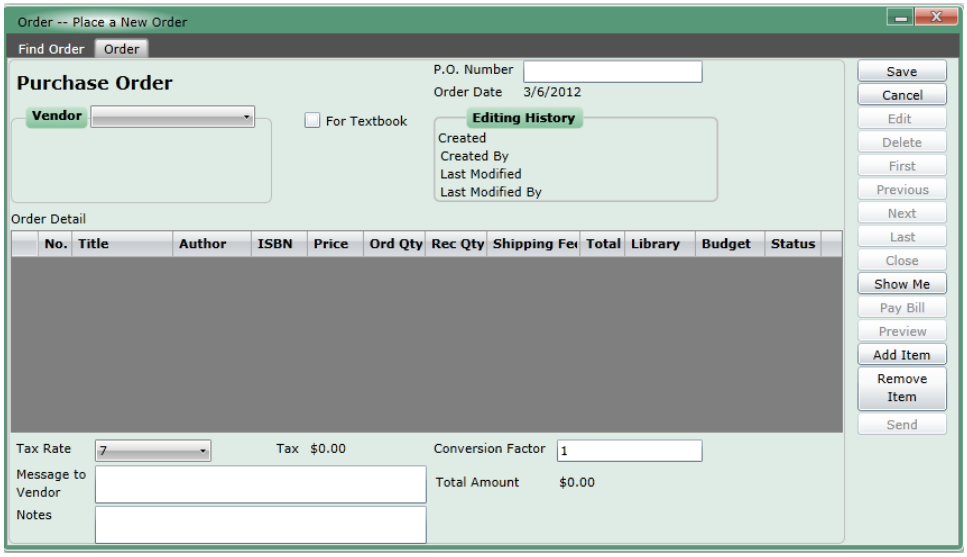
The Acquisition features manage:

1. Orders
2. Budgets
3. Vendors
4. Quotes through EDI

Find/Add Order

Insignia provides full Boolean searches for Acquisitions orders. The budget, shipping costs, conversion rate, and tax rate can all be managed by this module. The order can be recorded as paid for ahead of time, upon receipt of the items, or at a later date.

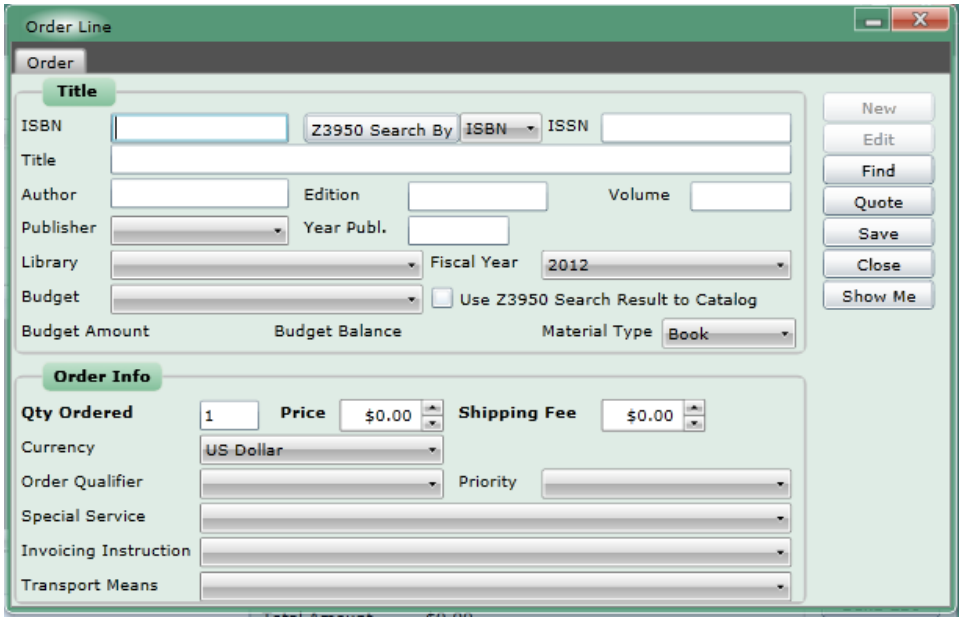




New

1. Click **Acquisitions > Find/Add Order**.
2. Click New.
3. Select a vendor from the list to order from.
4. If this is a textbook order, select the checkbox For Textbook.
5. Assign the P.O. Number (if any). If this field is left blank, the system will generate a P.O.
6. Click Add Item.

7. Enter the ISBN if known and the title details can by populated by clicking Z3950 Search By ISBN. Alternately, the title details can be entered manually. If the item exists in the catalog, the item information can be found by clicking Find.
8. Important fields to specify are Title/ISBN/Author, price, quantity, the budget and the library ordered for.
9. Click Save.



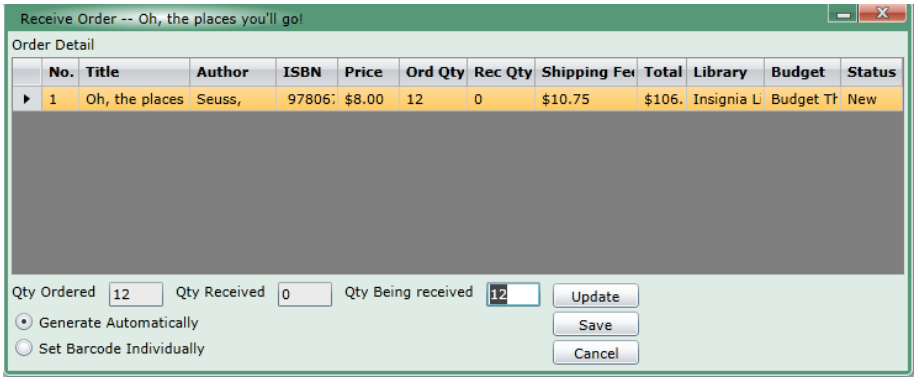
10. Repeat steps 6 through 9 until all items have been added to the order.
11. Enter any comments for the vendor.
12. Click Save.
13. Click Preview to preview purchase request, and print it out by clicking on the printer icon.
14. The order status when items are first added and saved will be “On Order”.

Tip: Change the Z39.50 hosts being searched by default by clicking **Administration > Other Libraries > Z39.50 hosts** and the hosts to be searched must have the Default box checked in the Details window.

Receive

When a library receives a shipment, the budget and catalog will update.

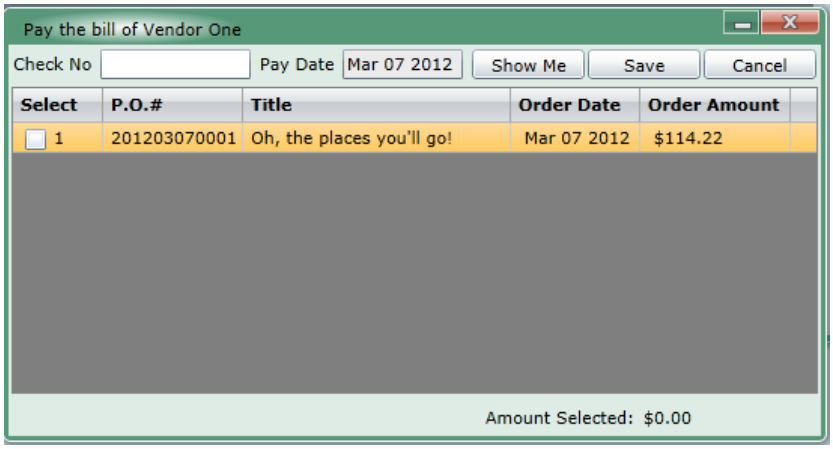
1. Click **Acquisitions > Find/Add Order**.
2. Find the purchase order for which user has received the shipment, select it, and click Detail.
3. Click Receive.
4. Select a line item.
5. In the Qty Being Added box, enter the number of copies received.
6. In the Purchase Price box, update the purchase price of the items.
7. Select Generate Automatically or Set Barcode Individually radio button.
8. Repeat step 4-6 for each item received.
9. Click Update.
10. Click Save.
11. Repeat these steps if not all of the items are updated.
12. The status of the order becomes “Received” if all of the items become received. The status of the order becomes “Receiving” if only some of the items become received.


Receive Order -- Oh, the places you'll go!
Order Detail
No. Title Author ISBN Price Ord Qty Rec Qty Shipping Fe Total Library Budget Status
1 Oh, the places Seuss, 97806 $8.00 12 0 $10.75 $106. Insignia L Budget Th New
Qty Ordered 12
Qty Received 0
Qty Being received 12
Update
Generate Automatically
Set Barcode Individually
Save
Cancel

Pay Bill

This feature records order payments.

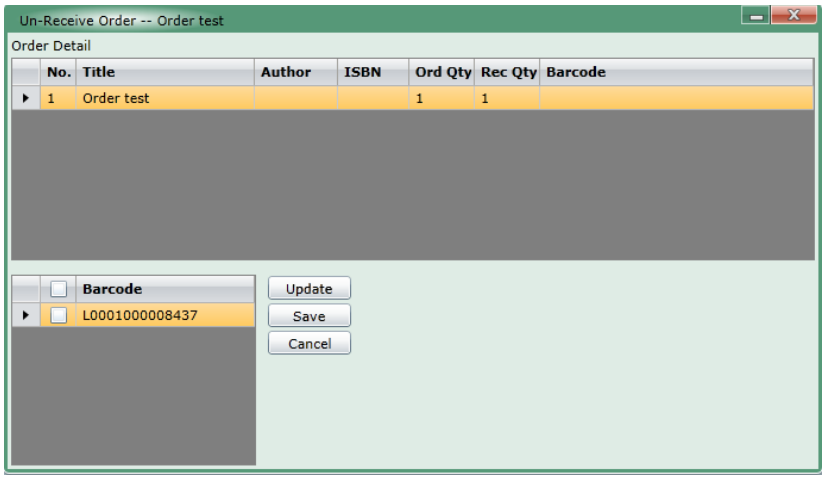
1. Click **Acquisitions > Find/Add Order**.
2. Find the order with an outstanding bill.
3. Click Pay Bill.
4. Enter the check number.
5. Select the items to be paid.
6. Click Save.
7. Repeat this process at a later time if not all items are selected.
8. If all of the items are paid but not yet received, the order status will become “Paid”.


Pay the bill of Vendor One
Check No
Pay Date Mar 07 2012
Show Me
Save
Cancel
Select P.O.# Title Order Date Order Amount
1 201203070001 Oh, the places you'll go! Mar 07 2012 $114.22
Amount Selected: $0.00

Un-Receive

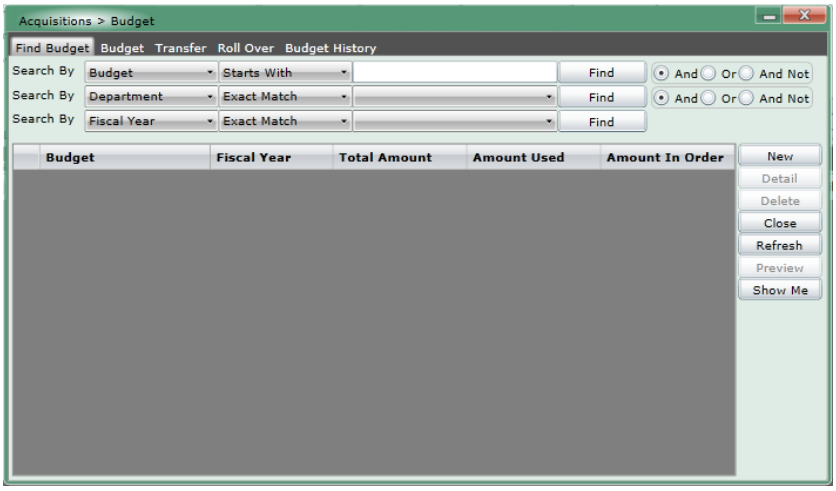
When a library needs to remove a shipment previously received, the budget and catalog will update.

1. Click **Acquisitions > Find/Add Order**.
2. Find the purchase order for which user has not received the shipment, select it, and click Detail.
3. Click Un-Receive.
4. Select an item from the Order Detail.
5. If applicable, select the item’s barcode(s) and click Update to add the barcode(s) to the item.
6. Click Save to un-receive the item.
7. If the order was in “Received,” “Receiving,” or “Completed” status, then the order status will change to either “Paid,” “Receiving,” or “On Order,” depending on how many items become removed.



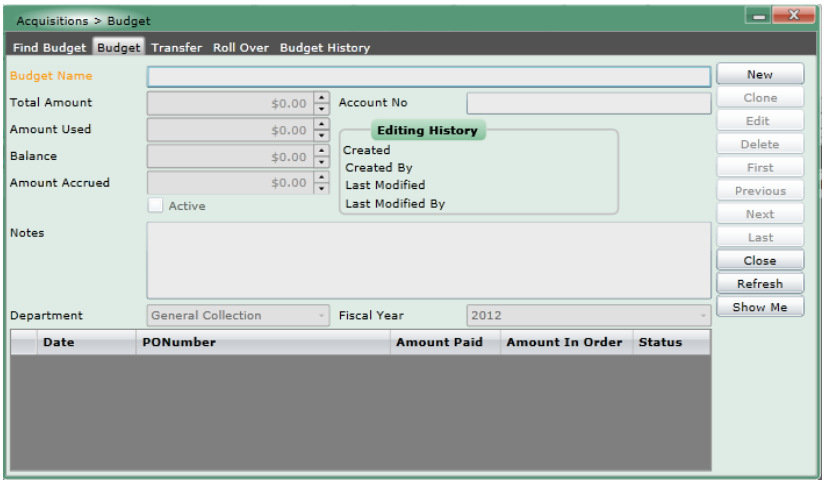
Find/Add Budget

The budget feature manages the funds spent on the collection.



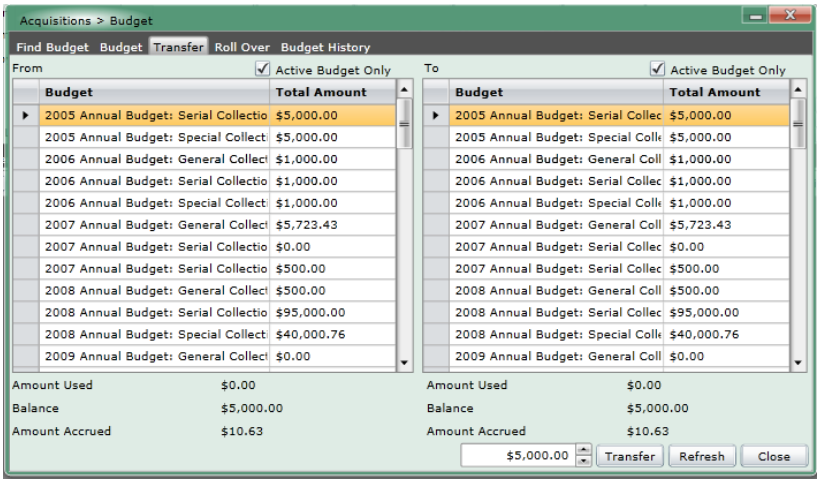
New

1. Click **Acquisitions > Find/Add Budget**.
2. Click New.
3. Enter the Relevant data.
4. Click Save.



Edit

1. Click **Acquisitions > Find/Add Budget**.
2. Find the budget to edit using search criteria.
3. Select the budget to edit.
5. Click Detail.
6. Click Edit.
7. Enter the relevant data.
8. Click Save.

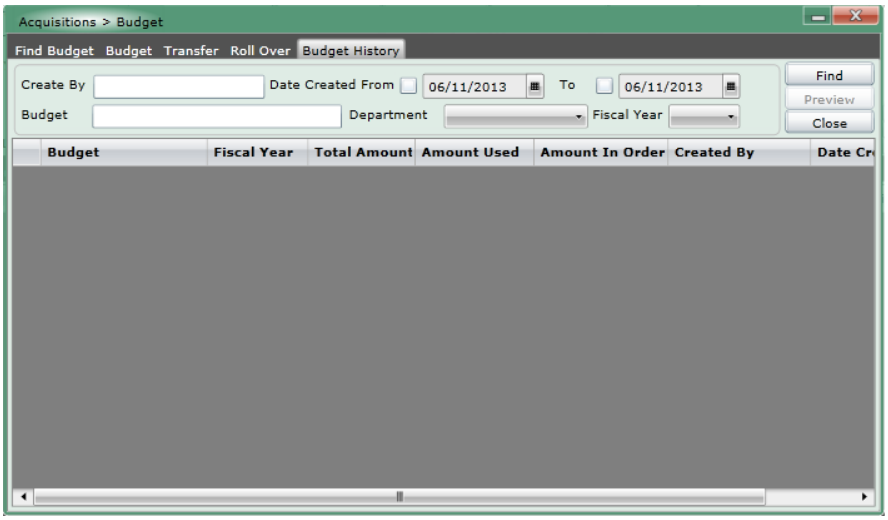


Transfer

1. Click **Acquisitions > Find/Add Budget**.
2. Click Transfer tab.
3. Click “Active Budget Only” checkbox in either grid to change the lists to active budgets available in your system.
4. Select the budget from which to transfer.
5. Select the budget to which to transfer.
6. Select an amount less than the balance available to transfer
7. Click Transfer.

Roll Over

1. Click **Acquisitions > Find/Add Budget**.
2. Click Roll Over tab.
3. Click "Active Budget Only" checkbox in either grid to change the lists to active budgets available in your system.
4. Select the checkbox beside the budget name to roll over.
5. Select the Fiscal Year for budget roll over.
6. Click Roll Over.



Budget History

1. Click **Acquisitions > Find/Add Budget**.
2. Click Budget History tab.
3. Fill in any of the following search criteria to find history:
    a. Type in the login name in "Create By".
    b. Type in the budget name in "Budget".
    c. Type in "Date Create From" and "To".
    d. Select "Department". This dropdown is modifiable from the Parameters menu.
    e. Select "Fiscal Year".
4. Click Find.

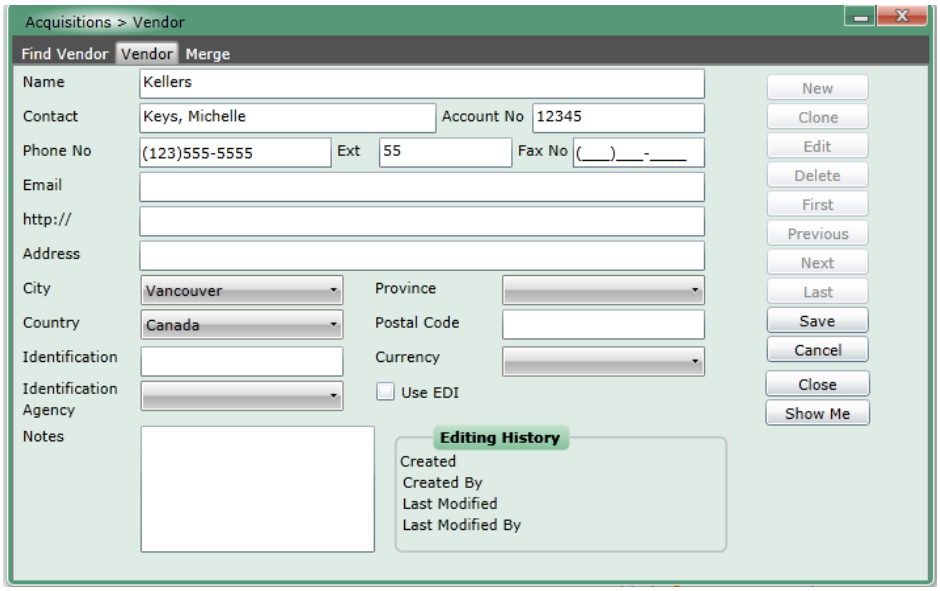
Find/Add Vendor

Vendor profiles can be kept in Insignia Library System database. This information from the profile is automatically used when contacting the vendor for placing an order or claiming orders that have not been received. The information can be used for communicating a purchase order with the vendor.

New

You may add vendors to this window.

1. Click **Acquisitions > Find/Add Vendor**.
2. Click New.
3. Enter all the relevant information.
4. Click Save.



Edit

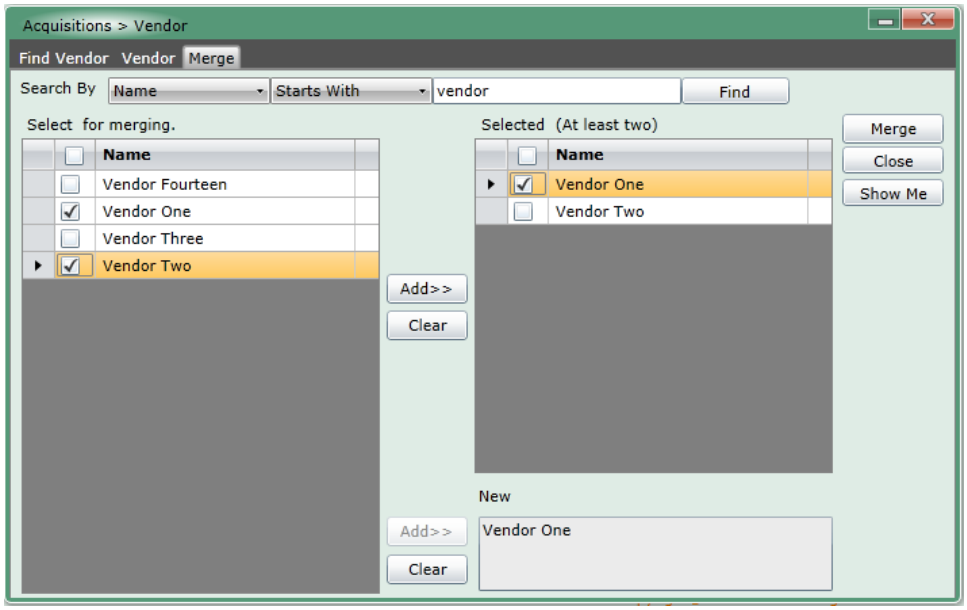
You may modify previously added vendors in this window.

1. Click **Acquisitions > Find/Add Vendor**.
2. Find the vendor to edit using the search criteria.
3. Select vendor to edit.
4. Click Detail.
5. Click Edit.
6. Edit relevant fields.
7. Click Save.

Merge

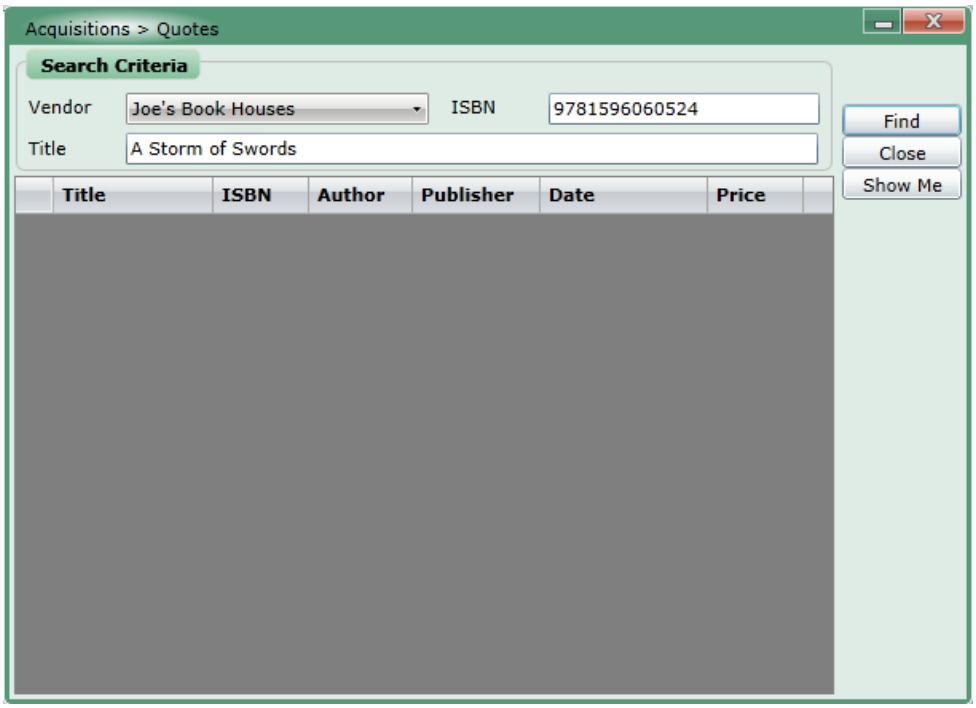
This feature can be used to merge vendors with duplicate vendor IDs in the system.

1. Click **Acquisitions > Find Vendor**.
2. Click Merge tab.
3. Search for the first vendor to be merged.
4. From the search results on the left, select the vendor to be merged by checking the box to the left of the vendors name.
5. Click Add.
6. Search for and add the other vendor(s) to be merged by repeating steps 4-5.
7. With at least one vendor in the Selected box, now select the name into which these vendors will be merged.
8. Search for and select the vendor.
9. Click Add.
10. The vendor to be merged under should appear in the New box.
11. Click Merge.



Quotes

The Quotes module enables quotes and information on potential materials considered for an order in acquisitions to be delivered through EDI.



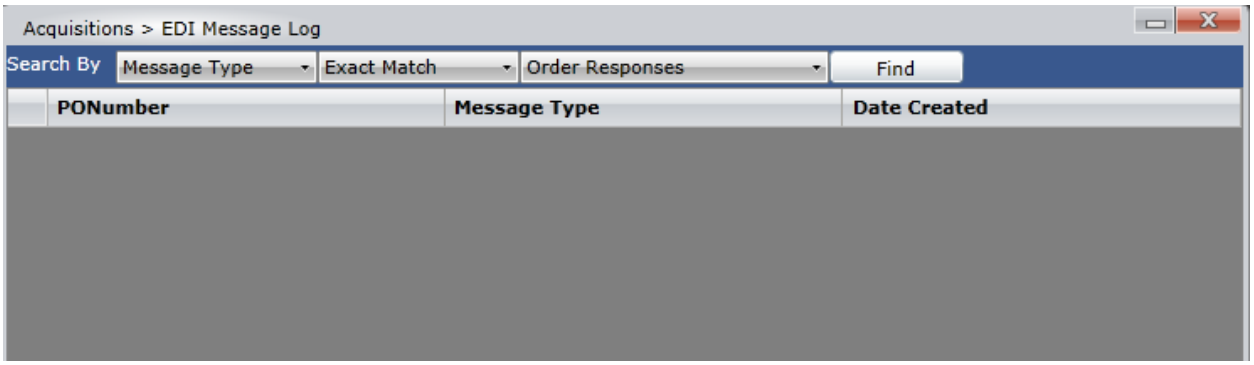
1. Select the vendor from the dropdown.
2. Type in the ISBN and/or Title, click Find.
3. View the potential order information including quoted price for the item in the grid below.
4. Potential ordering information can include: Title, ISBN, Author, Publisher, Date, and Price.

Receive EDI

This window lists and searches vendors and their contact information by name, and then provides more information on the receiving process. This can include totals of order responses, invoices, quotes, bad messages, total messages, and errors.

EDI Message Log

EDI Message Log includes PO Numbers, Message Types, and the date those messages were created.



Offline Circulation

In the event that the server or network is down, ILS has the capability to provide offline circulation. In order to do offline circulation and upload it, the Offline button in the Quick Toolbar. This will install a thin client on desktop, which is used in the event connection to server is down.
When unable to the server, click the ILS offline icon on the desktop. Using this program will allow for checkout, check in, inventory, and adding patrons.

When connection is restored to the server, user will get a prompt to upload the data.

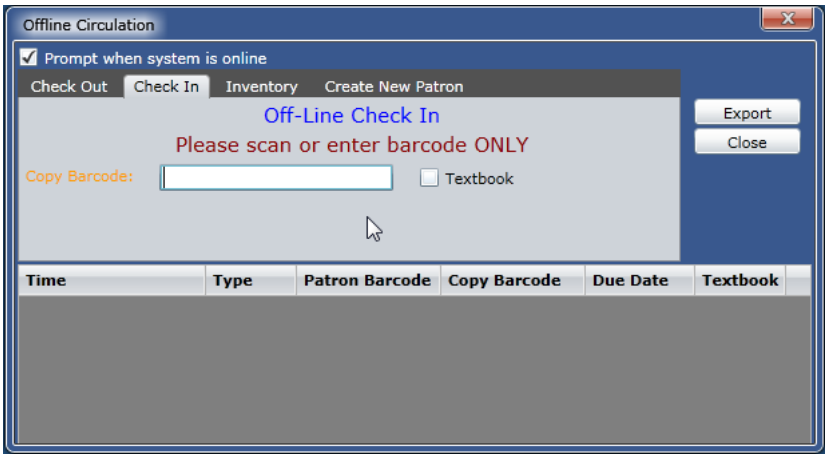
<u>Check Out</u>

1. Click the icon on desktop
2. Scan the patron card
3. Specify the default due date
4. If item being checked out is textbook, select the checkbox for Textbooks
5. Scan the book barcode

6. Repeat above steps for all the books
7. Press Esc when done with the patron
8. Now system is ready for the next patron

Check In

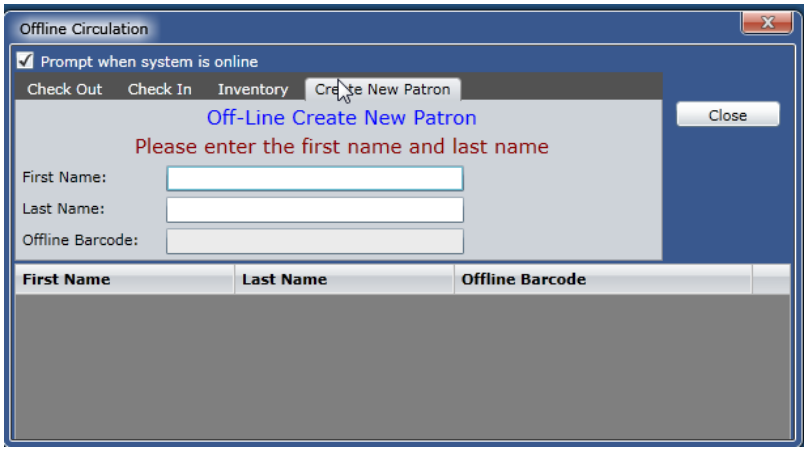
1. Click the icon on desktop
2. Click Check in Tab
3. Specify book as library book or textbook
4. Scan the book barcodes one after another



Create New Patron

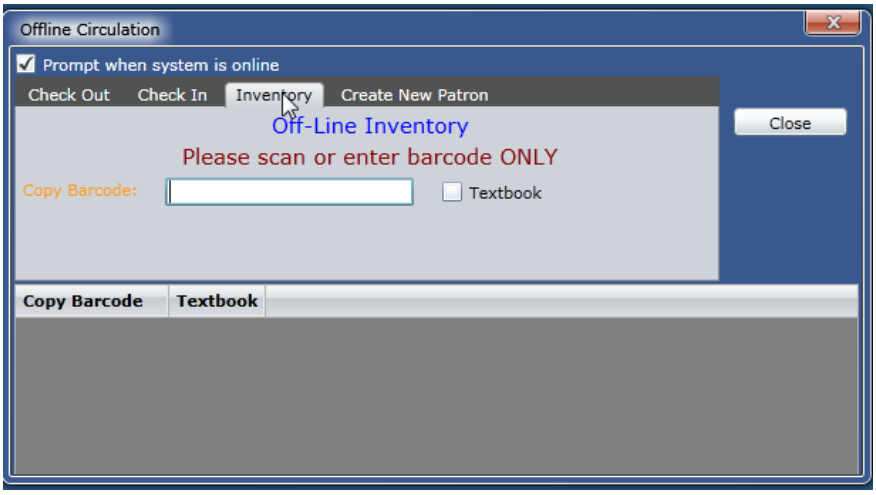
When you are in Offline mode, you can still add patrons into the system. Once you are back online, those patrons will be added to your system.

1. Click the icon on desktop
2. Click Create New Patron tab
3. Enter the first name, last name and barcode
   3.1. If no barcode is available leave it blank
   3.2. Repeat steps for each patron needed.



Offline Inventory

When you are in Offline mode, if you need you can still do your inventory. But since the program cannot check the barcodes you scan, the system will keep a text file of those barcodes allowing you to import it when you are back online.



Inventory

1. Click Inventory tab
2. If inventory is for textbooks, select the checkbox for Textbooks
3. Scan the barcodes

Offline Upload Data

As soon connection is restored, user will get a prompt to upload the data, Click Yes.

In the upload data screen select all records to be uploaded and click Upload. Those barcodes that cannot be uploaded due to incorrect barcode will become red, meaning system did not find those barcodes in the library.

Online Patron Access Catalog (OPAC)

Insignia Library System (**ILS**) empowers patrons to do much more than just search the library for books. Patrons can share favorites, add book reviews, rate and review books, and much more.

Patrons can do the following online:

1. Search the library
2. Reserve books
3. Renew books
4. Pay fine online
5. See loan history
6. See fine history
7. Rate books
8. Add Book Reviews
9. Create favorites
    9.1. Share favorites
    9.2. Email favorites
10. View Projects
11. Update personal profile
12. Reserve computer
13. Register online
14. View Upcoming Library Events
15. Request for new titles
16. Search online database

The OPAC can be accessed from any computer with Internet Explorer, Firefox, Google Chrome, or Safari.

ILS OPAC has search engines for every type of knowledge seeker. For example, a simple keyword search, a pictorial search, and an Advanced Search with Boolean terms are available to fulfill patron needs. The librarian has the option to enable or disable any of those features. Some of these features are system based, others are site based.

Important:
Before providing patron access to My Account, it is important that patron security is enabled with unique passwords for each patron's account. Otherwise patrons may inadvertently have unauthorized access to another patron's confidential information.

Home

This tab displays information related to your library such as office hours, announcements, online resources, pictures, videos, and quotes.

Pictures

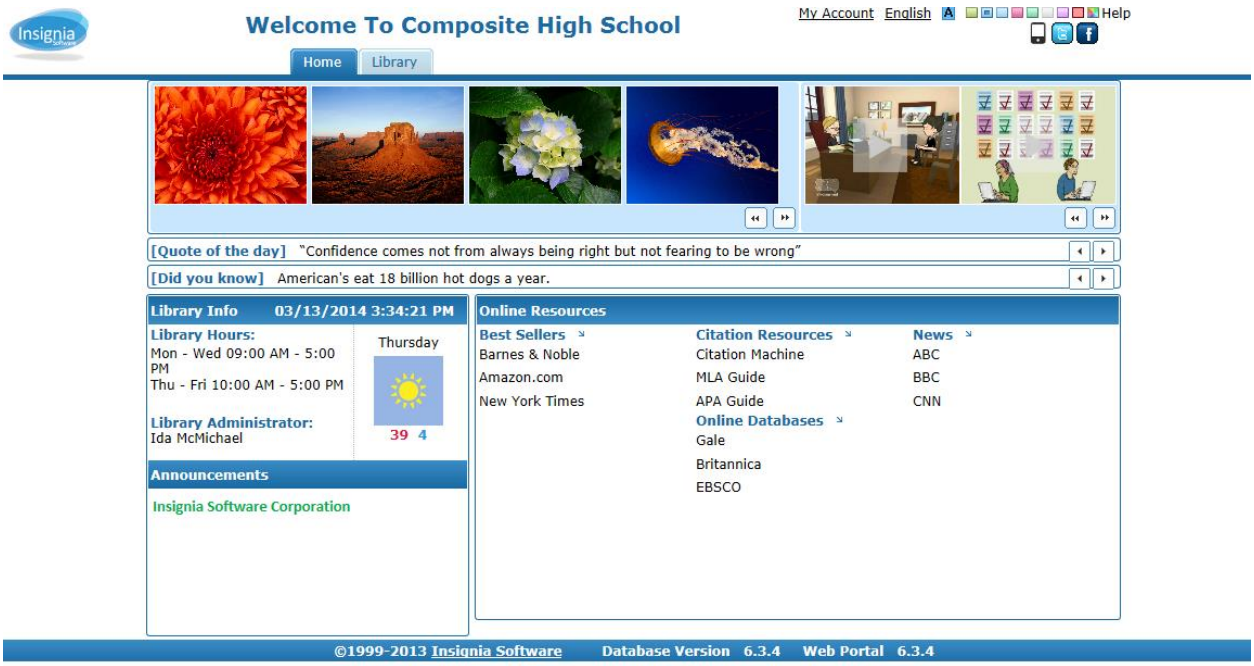
Display pictures of your library in a given order. Click on the image to see an enlarged version.

Videos

View video clips related to your library. Click on the video to see more playback options.

Quote of the Day

Display quotes of the day including custom quotes and quotes automatically supplied from Insignia.



Did You Know

This feature displays interesting daily facts on your library homepage each day.

Library Info

Information such as library office hours and the time can be displayed in this box.

Announcements

Announcements from the library can be added to this window to advertise library events.

Online Resources

This includes online and database resources that can be broken down into categories.

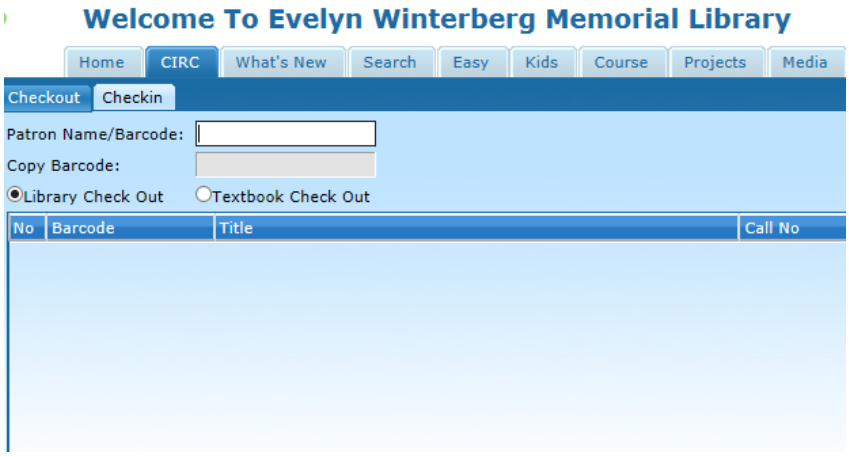
CIRC

This tab provides basic circulation functions such as check out and check in located conveniently in the OPAC without having to login to the ILS.

Check Out

Insignia allows checking out materials to patrons through the OPAC by performing the following steps:

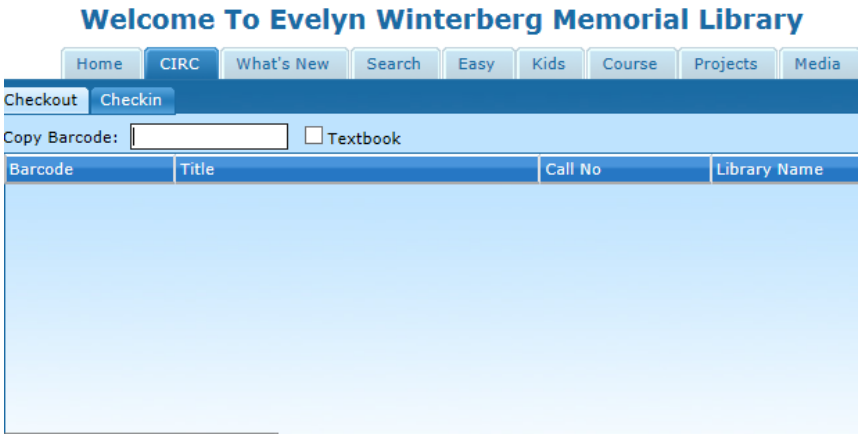
1. Select the radio button either for a Library Checkout or a Textbook Checkout.
2. Scan the patron barcode.
3. Scan the copy barcode.
4. View the copy information for materials checked out in the grid below.



Check In

Insignia allows checking in materials to patrons through the OPAC by performing the following steps:

1. Select the checkbox for textbook if appropriate.
2. Scan the copy barcode.
3. View the copy information for materials checked out in the grid below.



What's New

Select the local library site name from the dropdown to find out news on the following topics:

1. **Most Searched**: Lists the most searched for items.
2. **Most Circulated**: Lists the most popular circulated items.
3. **New Titles**: Lists the new items cataloged.
4. **Top Rated**: Lists the most highly rated books by patrons.
5. **Recommended**: Lists the items recommended by the librarian (see **Catalog > Cataloging > Recommended List** in the ILS).

RSS Feed

RSS Feeds provide value to the customer by setting up a news service bookmarked directly in their browser without visiting the site. For the Insignia OPAC, the RSS Feed will provide updates on most searched, most circulated, top rated, recommended, and new titles without visiting the OPAC. This can be helpful to librarians to view updates on this information organized by date as it changes. The RSS Feed provides tabs with records in your library organized into the following categories:

1. Most Searched

2. Most Circulated
3. Top Rated
4. Recommended
5. New Titles

Set Up an RSS Feed

1. Click What's New.
2. Click tab desired for the RSS Feed.
3. Click beside the results total.
4. A new window will open with headlines and captions.
5. Click "Subscribe to this feed".
6. Enter a name and click Subscribe.
7. Click "View My Feeds".
8. The RSS Feed for Insignia will display alongside other subscribed RSS Feeds.

OPAC Search

Within the Search tab there are three search engines: Simple, Advanced, and Power. This interface provides patrons the ease (Simple and Power search engines) and power (Advanced search engine) to search the library catalog. Selecting the Results in Grid check box will change the view when records are returned to a grid view.

Search (Simple Search)

1. Go to the OPAC URL.
2. Select the Search tab.
   2.1. The simple search should be selected by default.
3. Enter the search criteria and terms.
4. Press Enter.

4.1 The default search is by keyword.
4.2 To search by some other criteria such as title, author, call no, series title or subject, make the appropriate selection.
4.3 To search only a specific type of collection or location, make the appropriate selection.
5. When searching by author name enter last name and then first name.
6. Search Reading Program by selecting the Reading Program, specify the parameters, the search criteria and then click one of the search buttons. Find titles by using either first name then last name of an author or just the author's first name then search by Any Match instead of Starts With.
7. If a word is misspelled, the system will do spell check and phonetic search.
8. Refine search results by clicking one of the headings on the left, the system lists related subjects, authors who have written similar titles, series, publication dates, and Reading Programs on the left. Once you have clicked on a Refine option, click the X beside that box to clear that refined search option.
9. To invoke a previous search during the current session, click the search in the search history list.
10. View basic record information by hovering the cursor on the image. Click the image to view more detailed information on the record.

Favorites List

1. Login to your patron profile and generate search results.
2. Click the "Add to Favorites" link on a search result.
3. Input a name of the list to put the title in the window on the right.
4. The following options are available: Print, Email, Reserve, and Share.

Print Favorites

1. Favorites Lists can print as a bibliography in the following formats:
   1.1. Brief List, Detail List, Bibliography, MLA, APA, Chicago

Email Favorites

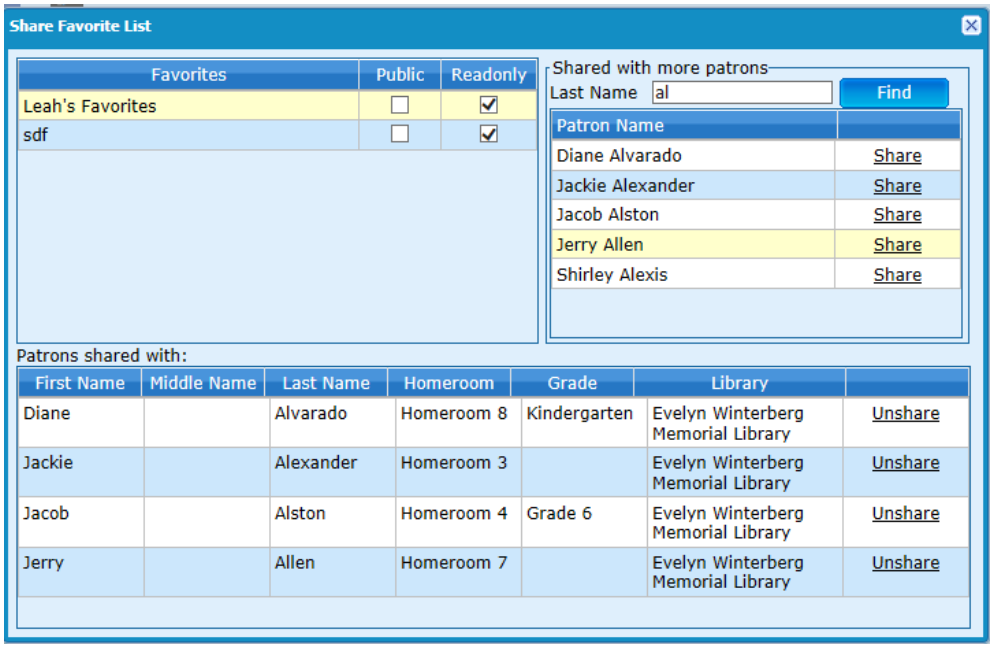
1. Fill out the following criteria to see the favorites list in a bibliography.
   1.1. : Title, Sent from, Email, Notes, E-mail Scheme
      1.1.1. Brief List, Detail List, Bibliography, MLA, APA, Chicago

Reserve Favorites

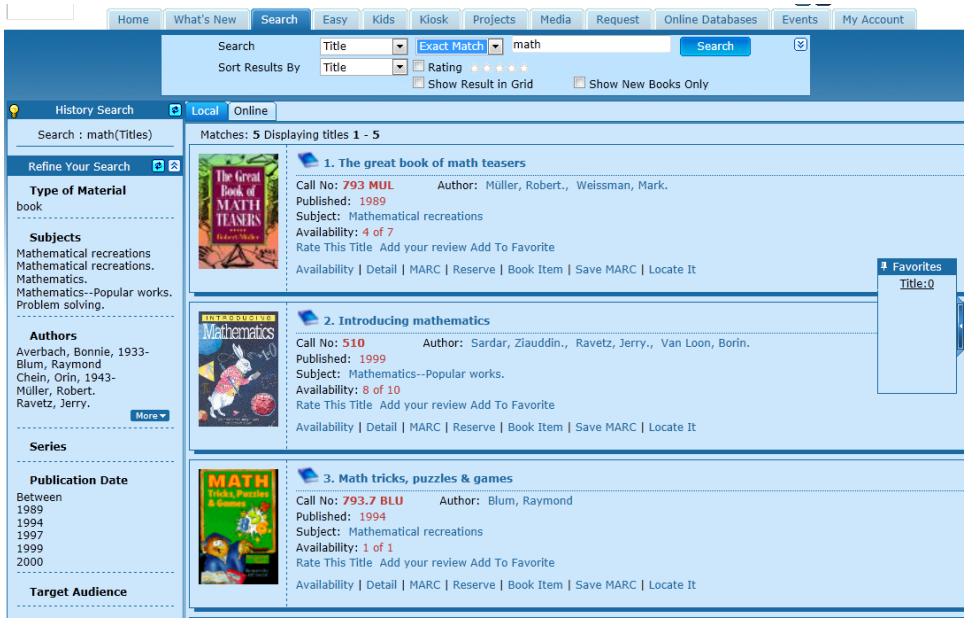
1. Click "Reserve" and click "Ok".

Share Favorites

1. Select whether Favorites Lists can be "Public" or if they're "Read-Only".
2. Search for patrons to share lists with by their last name and click "Find".
3. Click "Share" beside the patron's names and their names will list in the grid below:



4. Click “Unshare” to stop sharing the list with a patron.



Search Results

Detail

1. To get more information on a title, click the title.
2. The system will show detailed information on the record and holdings including links to the following:
   2.1. File formats: PDF, Word, Excel
   2.2. Media content: web links, audio, video, images
   2.3. Social media: Locate It, Twitter, Facebook.

MARC

1. View the MARC record of the item in the catalog, without looking it up in the ILS.

Availability

1. View the status and location of the copy.
2. Book or reserve the copy from the link provided.

Reviews

1. View reviews posted by patrons and approved by librarians.

Shelf List

1. To view items available on the shelf surrounding this title, select the shelf list tab.

Cover Image

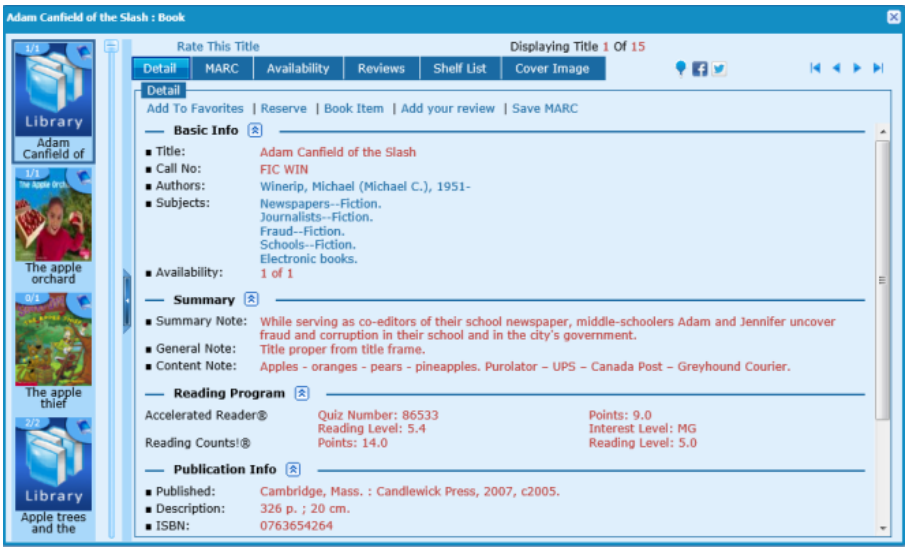
1. View the cover image of the item in the catalog.

Locate It

1. Click this icon to see the shelf where the copy is located on the library map.

Facebook or Twitter

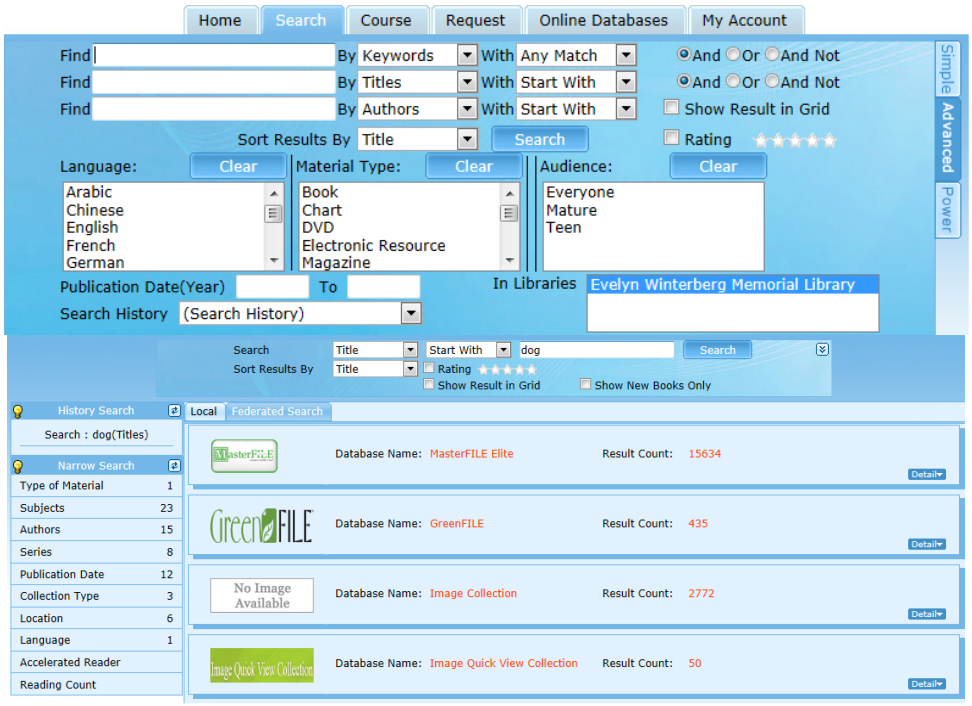
2. Login to Facebook or Twitter account.
3. Post a status with title information, author, and a link to the detail viewed in the OPAC on Facebook or Twitter account.


Adam Canfield of the Slash : Book
Rate This Title
Displaying Title 1 Of 15
Detail
MARC
Availability
Reviews
Shelf List
Cover Image
Add To Favorites | Reserve | Book Item | Add your review | Save MARC
Basic Info
Title: Adam Canfield of the Slash
Call No: FIC WIN
Authors: Winerip, Michael (Michael C.), 1951-
Subjects: Newspapers--Fiction.
Journalists--Fiction.
Fraud--Fiction.
Schools--Fiction.
Electronic books.
Availability: 1 of 1
Summary
Summary Note: While serving as co-editors of their school newspaper, middle-schoolers Adam and Jennifer uncover fraud and corruption in their school and in the city's government.
General Note: Title proper from title frame.
Content Note: Apples - oranges - pears - pineapples. Purolator – UPS – Canada Post – Greyhound Courier.
Reading Program
Accelerated Reader® Quiz Number: 86533 Reading Level: 5.4 Points: 9.0 Interest Level: MG Reading Level: 5.0
Reading Counts!® Points: 14.0
Publication Info
Published: Cambridge, Mass. : Candlewick Press, 2007, c2005.
Description: 326 p. ; 20 cm.
ISBN: 0763654264
Adam Canfield of
The apple orchard
The apple thief
Apple trees and the

Advanced Search

Advanced Search allows the patrons to define more parameters for their search.

1. Go to the OPAC URL.
2. Click the Search tab.
3. Click the Advanced tab.
4. Select the library to search; by default system will detect library based on patron IP address or the last library selected. To select more than one library, hold down Ctrl**;** or user can choose All Libraries.
5. Enter search terms, and choose the desired search criteria and Boolean operators AND, OR, AND NOT to limit the search.
6. Enter search criteria and click Search.
7. The Narrow Search toolbar will show the number of results in different categories. This toolbar will also show the History of Searches. The Refine Your Search toolbar can sort your results according to your preferences. Click to change from one toolbar to the other.
8. Federated search results can be seen by using the local and online tabs.
9. Patron can refine their search results by specifying viewing the categories in either toolbar:
    9.1. Type of Material
    9.2. Subjects
    9.3. Authors
    9.4. Series
    9.5. Publication Date
    9.6. Target Audience
    9.7. Collection Type
    9.8. Location
    9.9. Language
    9.10. Accelerated Reader
    9.11. Reading Count



Power Search

Power search enables a patron to search by specifying criteria for the most common search parameter fields. The copies number will show the total available not including copies on reserve and copies on loan.

1. Go to the OPAC URL.
2. Click the Search tab.
3. Click the Power tab.
4. Enter search value for any of the parameters.
5. Click Search.

Search Criteria

1. In the power search patron can search multiple fields at the same time including:

1.1. Title
1.2. Keyword
1.3. Author
1.4. Subject
1.5. Series Title
1.6. ISBN
1.7. Publisher

2. The criteria also covers the following search fields in ranges including reading programs:
   2.1. Call No
   2.2. AR level
   2.3. RC Level
   2.4. BA Grade
   2.5. Lexile
   2.6. Fountas
   2.7. Publication Year
3. This also includes the following dropdown menus and checkboxes:
   3.1. In Libraries
   3.2. Sort Results by
   3.3. Search History
   3.4. Language

Easy

The easy search engine incorporates a Cloud searching ability. When a search is completed, the Word Cloud appears on the left hand side. This feature generates words related to the search topic to assist in building the search. The related words are generated from a Thesaurus, Spell Check, Authority Records, and can be customized in **Catalog > Cloud Search**.

1. Go to the OPAC URL.
2. Click the Easy tab.
3. Enter a search term and click Search.
4. To do a search on the related terms from the cloud search, click the term in the cloud.
   4.1. Each click will do another search on that clicked word.

Kids Search

The Kids Search engine allows young patrons to search by specifying the most common parameters, such as title, author, keyword, subject or series. Simply enter a term and click search by icon.

1. Go to the OPAC URL.
2. Click the Kids tab.
3. Enter a search term and click Search.
4. Click the refine option on the left hand side to further limit the search results in the window.

Kiosk Search

Kiosk search is a categorical, hierarchical, and pictorial search. All categories are represented by icons and follow from broader subjects to more specific search terms.

1. Go to the OPAC URL.
2. Click the Kiosk tab.
3. Click the picture that best matches the search required.
4. Continue clicking on pictures to narrow the search.
5. When the picture that best matches search is found, scroll down the list of results belonging to the category.
6. Click the Back icon to go back into the higher hierarchy.

Z39.50

The Z39.50 section allows other Z39.50 compatible libraries from around the world to be searched. This search is helpful as it provide which libraries have a given title.

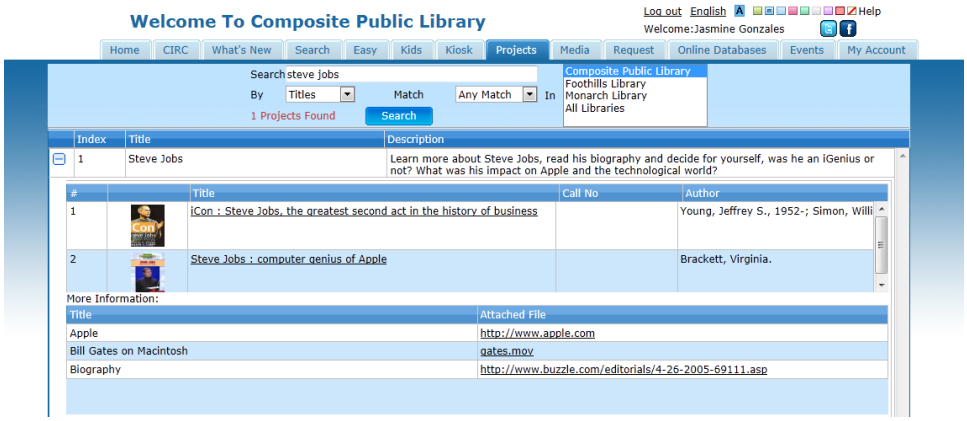
1. Go to the OPAC URL.
2. Click the Z39.50 tab.
3. Select the libraries you would like to search.
4. Enter a search term and click Search
5. Items found will appear in the window.

Projects

Patrons can view projects that have been created by staff.

1. Go to the OPAC URL.
2. Click the Projects tab.
3. Select the library for which you would like to see projects.

4. Specify search criteria.
5. Click Search.
6. In the results list, click the title of a project to see the project details.
7. Any attachments to the project are listed in the grid below. Attached documents are keyword indexed for searching.
8. The cover images of materials used in projects are now displayed in the Project.


Welcome To Composite Public Library
Log out English Help
Welcome:Jasmine Gonzales
Home CIRC What's New Search Easy Kids Kiosk Projects Media Request Online Databases Events My Account
Search steve jobs
By Titles Match Any Match In
Composite Public Library
Foothills Library
Monarch Library
All Libraries
1 Projects Found
Search
Index Title Description
1 Steve Jobs Learn more about Steve Jobs, read his biography and decide for yourself, was he an iGenius or not? What was his impact on Apple and the technological world?
Title Call No Author
1 iCon : Steve Jobs, the greatest second act in the history of business Young, Jeffrey S., 1952-; Simon, Willi
2 Steve Jobs : computer genius of Apple Brackett, Virginia.
More Information:
Title Attached File
Apple http://www.apple.com
Bill Gates on Macintosh gates.mov
Biography http://www.buzzle.com/editorials/4-26-2005-69111.asp

Media

The media section allows for the borrowing and reserving of media and assets from the library. Log in to use this feature.

1. Go to the OPAC URL.
2. Click the Media tab.
3. In the first dropdown menu select Assets, Kits, or Rooms.
4. Select the asset type (if applicable) using the dropdown on the right side.
5. This will cause the items to show in the grid below.
6. Next select an item or items by checking the check box to the left to be borrowed.

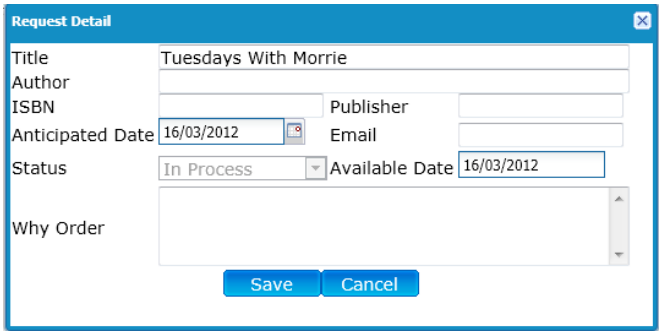
Welcome To Composite Public Library
Log out English Help
Welcome:Jasmine Gonzales
Home CIRC What's New Search Easy Kids Kiosk Projects Media Request Online Databases Events My Account
Select Media Type Asset By Title
Find
Booking List
Title Barcode Type Status Book

7. Select the time frame that the asset is needed.
8. If a technician is required select the Technician Required checkbox.
9. Select if these items are to be picked up or delivered
10. Enter comments (if needed).
11. Click Book.
12. Repeat for as many items as you need to book.
13. By clicking Check Availability, the availability of this media for the selected time frame will be displayed.
14. Add media files by clicking **Assets > Find/Add Assets**.

Request

The request section allows patrons to request items that the library current does not have.

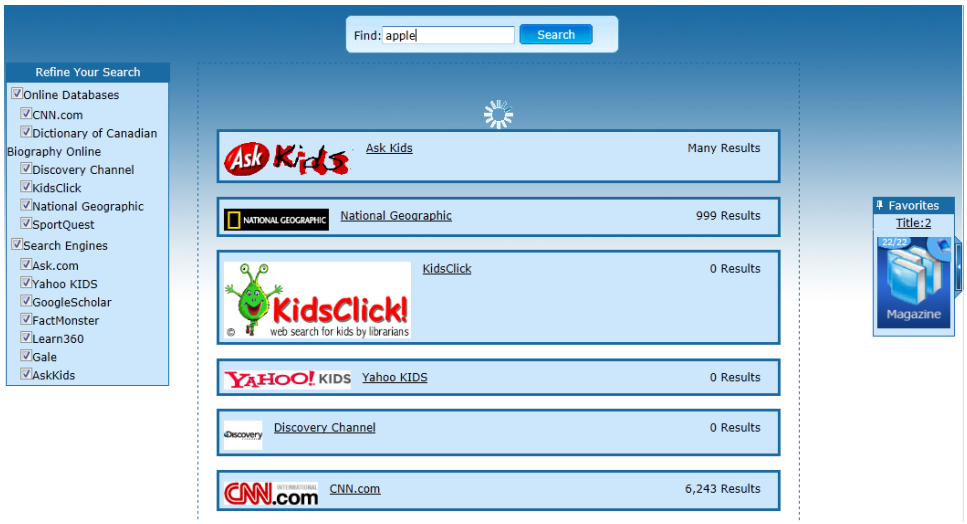
1. Go to the OPAC URL.
2. Click the Request tab.
3. Click the Request a book button.
4. Enter the item request information.
5. Click Save to submit that request.
6. Repeat steps 3-6 for each request needed.
7. View requests in the ILS by clicking **Catalog > Cataloging > Find/Add New Request**.



Online Databases

Online databases are available in the federated interface.

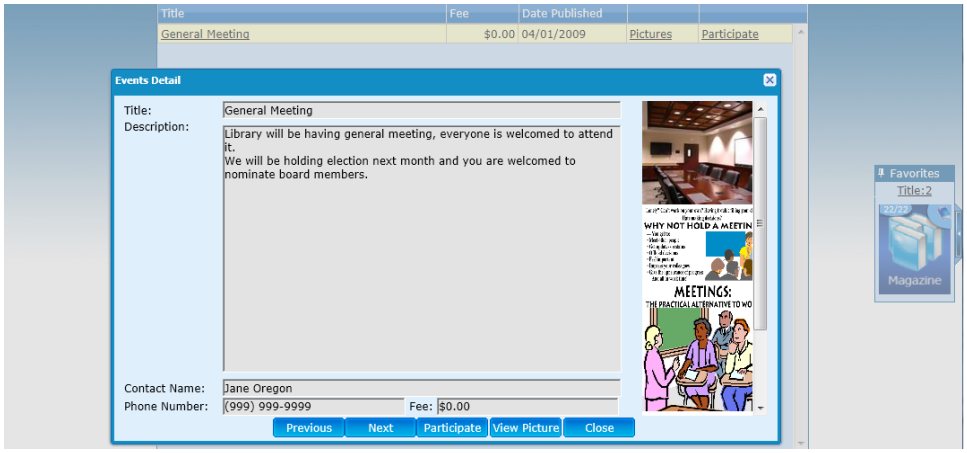
1. Go to the OPAC URL.
2. Click the Online Databases tab.
3. Enter a search term in the search box.
4. Select the check boxes beside the online databases you would like to search.
5. Click Save.
6. For the selected databases you will then see a listing of all results found at those sites.
7. Simply click the site link to open a window that will take you to that database web site and show you the results.
8. Select the databases viewed in this window by clicking **Administration > System Setting > Online Databases**.



Events

The Events section provides an online list of upcoming events. Patrons can participate in these events and even upload pictures.

5. Go to the OPAC URL.
6. Click the Events tab.
7. Select an event by clicking on it.
8. Information and pictures from that Event will open up in another window.
9. Click the Participate button to choose participate in this library event.
10. Clicking View Picture will open a window displaying pictures for this event.
11. Using the next and previous buttons will list each event listed.
12. Add events from the ILS by clicking **Administration > Library Settings > Events**.



My Account

The My Account section allows the patron to login to the OPAC and view their borrowing information. Access is configured in the ILS in **Administration > Library Settings > Configuration** on the OPAC tab.

1. Go to the OPAC URL.
2. Click the My Account tab.
3. Enter Patron ID and Password and click login.
4. This will open up the above window listing all the tabs that the librarian has configured to show.

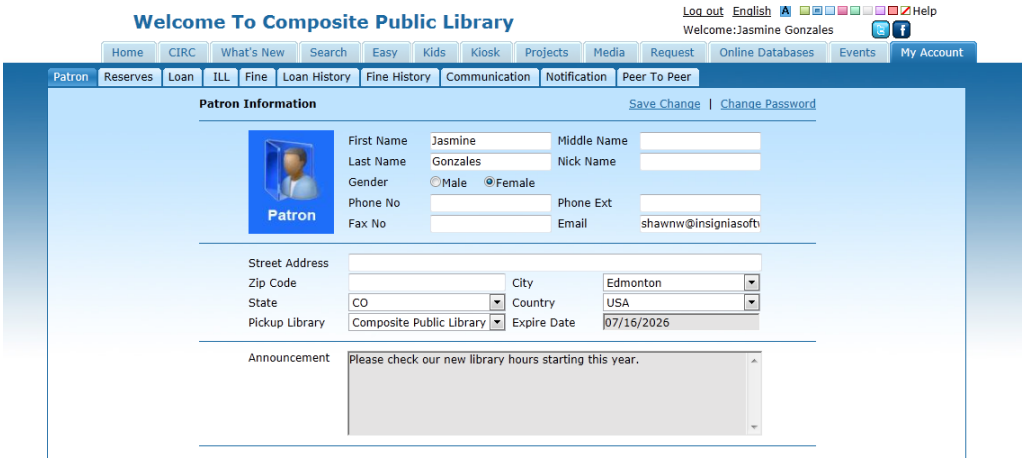
My Account Tabs

1. **Patron Information**: This view displays personal information for this patron, such as address, email, phone number, etc.
2. **Reserves**: This view displays the items patron has reserved.
3. **Loan**: This view displays items currently on loan.
4. **ILL**: This view displays Shows current Interlibrary loaned items
5. **Fine**: This view lists all owing fines.
6. **Loan History**: This view loan history for this patron.
7. **Fine History**: This view Fine history for this patron.
8. **Computer bookings**: This view displays any current computer bookings.
9. **Reading Program**: This view displays any summer reading programs.
10. **Communication**: This view displays communication between patrons and library staff. Library staff can send messages that appear here through the **Patron > Find/Add Patron > Communication** Tab.
11. **Notification**: Lists all Notifications sent to the patron.
12. **Networking**: This feature allows you to add other patrons in the library database into a friend list. This shares borrowing information between patrons that have friended one another such as loan information, reserves, and bookings. By friending a patron they are granted access to borrowing information.

13. These features can become visible or invisible in the OPAC tab of **Administration > Library Setting > Configuration.**

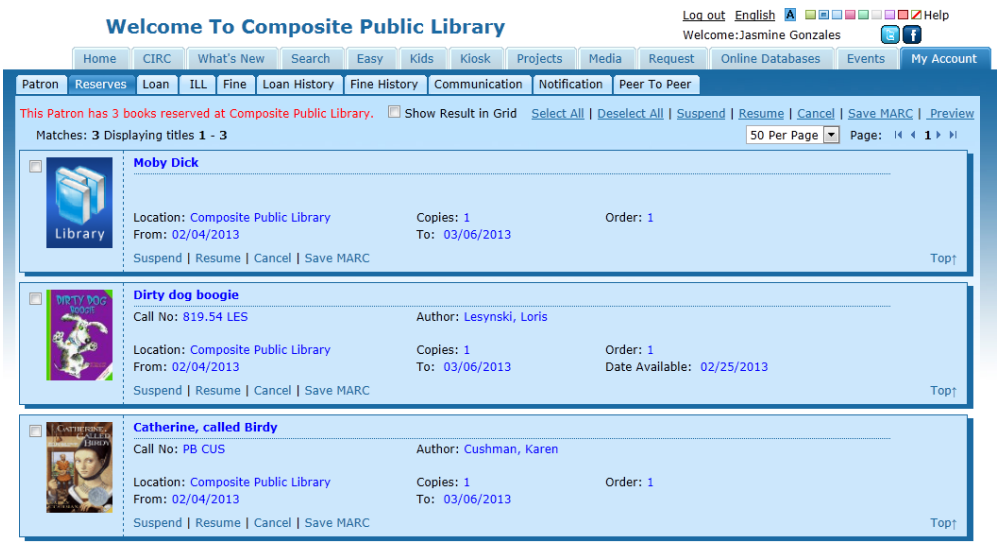
Patron Profile

1. Go to the OPAC URL.
2. Click the My Account link.
   2.1. Enter login information if prompted.
3. To modify personal information
   3.1 Make the changes.
   3.2 Click Save Change.



Patron Reserves

1. Go to the OPAC URL.
2. Click the My Account link.
   2.1. Enter login information if prompted.
3. Click the reserve tab.
4. All current reserves are listed.
5. Select an item and click Cancel to cancel that reserve.
6. Select an item and click Save MARC to save a copy of that MARC record to file.
7. Use the preview to generate a printable reserve list.


Welcome To Composite Public Library
Log out English Help
Welcome:Jasmine Gonzales
Home CIRC What's New Search Easy Kids Kiosk Projects Media Request Online Databases Events My Account
Patron Reserves Loan ILL Fine Loan History Fine History Communication Notification Peer To Peer
This Patron has 3 books reserved at Composite Public Library.
Show Result in Grid
Select All | Deselect All | Suspend | Resume | Cancel | Save MARC | Preview
Matches: 3 Displaying titles 1 - 3
50 Per Page
Page: 1
Moby Dick
Location: Composite Public Library
Copies: 1
Order: 1
From: 02/04/2013
To: 03/06/2013
Suspend | Resume | Cancel | Save MARC
Top↑
Dirty dog boogie
Call No: 819.54 LES
Author: Lesynski, Loris
Location: Composite Public Library
Copies: 1
Order: 1
From: 02/04/2013
To: 03/06/2013
Date Available: 02/25/2013
Suspend | Resume | Cancel | Save MARC
Top↑
Catherine, called Birdy
Call No: PB CUS
Author: Cushman, Karen
Location: Composite Public Library
Copies: 1
Order: 1
From: 02/04/2013
To: 03/06/2013
Suspend | Resume | Cancel | Save MARC
Top↑

Loan

1. Go to the OPAC URL.
2. Click the My Account link.
   2.1. Enter login information if prompted.
3. Click Loan tab.
4. This view displays lists all the current items on loan.
5. Select an item and click the Renew button to renew that item.
6. Select an item and click Save MARC, to save a copy of that MARC record to file.
7. Use the preview to a printable list of current items on loan.

Welcome To Composite Public Library
Log out English Help
Welcome:Jasmine Gonzales
Home CIRC What's New Search Easy Kids Kiosk Projects Media Request Online Databases Events My Account
Patron Reserves Loan ILL Fine Loan History Fine History Communication Notification Peer To Peer
Include Copy Info This Patron has 7 books out. Show Result in Grid
Select All | Deselect All | Renew | Preview | Save MARC
Matches: 7 Displaying titles 1 - 7
50 Per Page Page: 1
Biology 20
Call No: TXT BIO20 Author: Bison, Bernie
Barcode: T0001000000453 Due Date: 11/21/2012
Times Renewed: 0 Replacement Cost: $40.00
Renew | Save MARC Top↑
Chemistry 30
Call No: TXT CHE30 Author: Chapper, Charlie
Barcode: T0001000000845 Due Date: 11/21/2012
Times Renewed: 0 Replacement Cost: $40.00
Renew | Save MARC Top↑

ILL

1. Go to the OPAC URL.
2. Click the My Account link.
   2.1. Enter login information if prompted.
3. Click ILL tab.
4. This list displays all the current ILL items.

Fine

1. Go to the library URL.
2. Click the My Account link.
   2.1. Enter login information if prompted.
3. Click Fine tab.
4. Outstanding fines will be listed here.

Loan History

1. Go to the library URL.
2. Click the My Account link.
   2.1. Enter login information if prompted.
3. Click Loan History tab.
4. The default is a year from today.
   4.1 To change the date click the calendar and select the date.
5. Click Search.
6. Click the preview to view a printable list of items.

Fine History

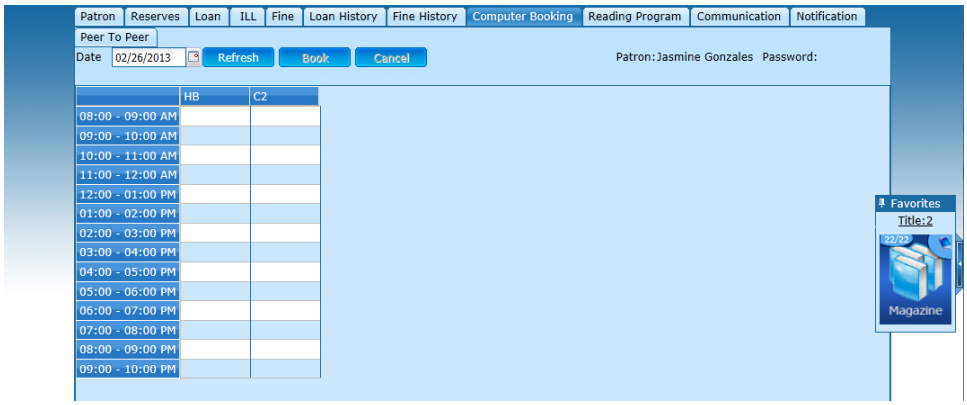
1. Go to the library URL.
2. Click the My Account link.
   2.1. Enter login information if prompted.

3. Click Fine History tab.
7. The default is a year from today.
   4.2 To change the date click the calendar and select the date.
4. Click Search.
5. Click the preview to view a printable list of items.

Computer Booking

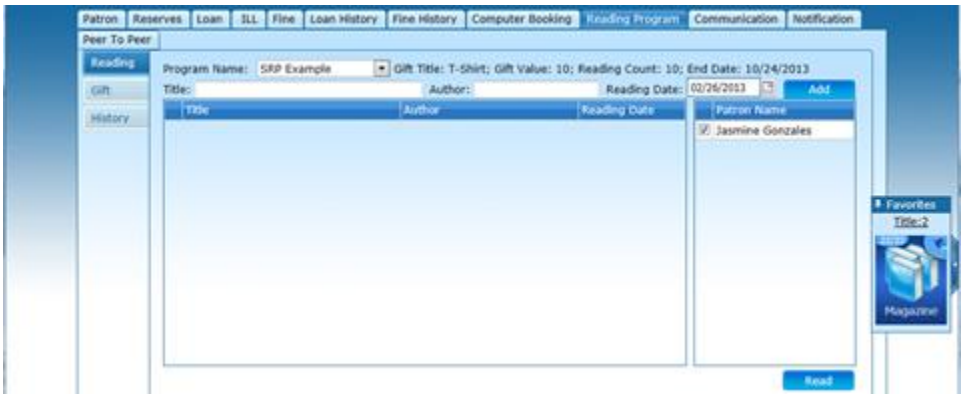
Computer booking can be set up by patrons (if enabled in the ILS).

8. Go to the library URL.
9. Click the My Account link.
   9.1. Enter login information if prompted.
10. Click the Computer Booking tab.
11. The bookings are listed here.
12. To cancel a booking simply select one of the booked time slots and click Cancel.
13. To make a booking please select a time slot and click the Book button.
14. Click **Administration > Library Setting > Configuration** in the ILS and select the checkbox under the OPAC tab to enable this feature.



Reading Program

10. Go to the library URL.
11. Click the My Account link.
    11.1. Enter login information if prompted.
12. Click Reading Program tab.
13. In the program name box select the reading program.
14. Enter the Title and Author into the respective fields select the reading date and then click Add.
15. Repeat these steps for all items you will be reading.
16. Once a book is read select it in the list and click Read (systems tracks this item as being read).
17. To view the gifts available click the Gift tab.
18. Clicking on the history tab will show a history of all Summer Reading programs the patron has participated in.



Communication

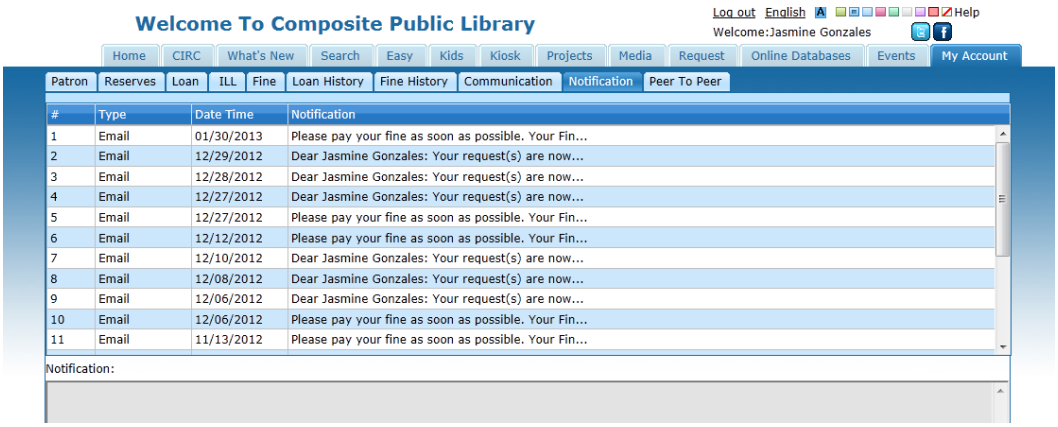
This lists messages between the patron and the librarian.

1. Go to the library URL.
2. Click the My Account link.
   2.1. Enter login information if prompted.
3. Click Communications tab.
4. This feature logs communication between the patron and library staff.
5. To reply, select the communication and enter a message into the reply message field and click reply.

Notification

This interface list all the notifications sent to the patron. This includes email messages.

1. Go to the library URL.
2. Click the My Account link.
   2.1. Enter login information if prompted.
3. Click Notification tab.
4. This tab lists all the notifications and messages that have sent to the patron.


Welcome To Composite Public Library
Log out
English
Help
Welcome:Jasmine Gonzales
Home
CIRC
What's New
Search
Easy
Kids
Kiosk
Projects
Media
Request
Online Databases
Events
My Account
Patron
Reserves
Loan
ILL
Fine
Loan History
Fine History
Communication
Notification
Peer To Peer
Type Date Time Notification
1 Email 01/30/2013 Please pay your fine as soon as possible. Your Fin...
2 Email 12/29/2012 Dear Jasmine Gonzales: Your request(s) are now...
3 Email 12/28/2012 Dear Jasmine Gonzales: Your request(s) are now...
4 Email 12/27/2012 Dear Jasmine Gonzales: Your request(s) are now...
5 Email 12/27/2012 Please pay your fine as soon as possible. Your Fin...
6 Email 12/12/2012 Please pay your fine as soon as possible. Your Fin...
7 Email 12/10/2012 Dear Jasmine Gonzales: Your request(s) are now...
8 Email 12/08/2012 Dear Jasmine Gonzales: Your request(s) are now...
9 Email 12/06/2012 Dear Jasmine Gonzales: Your request(s) are now...
10 Email 12/06/2012 Please pay your fine as soon as possible. Your Fin...
11 Email 11/13/2012 Please pay your fine as soon as possible. Your Fin...
Notification:

Peer to Peer

This feature allows patrons to add other patrons in the library into a friend list. This would allow the patrons friends to view loans, reserves, and bookings. Shared info center tab shows what is information is shared and by whom.

1. Go to the library URL.
2. Click the My Account link.
   2.1. Enter login information if prompted.

3. Click Notification tab.

Welcome To Composite Public Library
Log out English Help
Welcome:Jasmine Gonzales
Home CIRC What's New Search Easy Kids Kiosk Projects Media Request Online Databases Events My Account
Patron Reserves Loan ILL Fine Loan History Fine History Communication Notification Peer To Peer
Request
Accept
Friends
Shared Info Center
Search for: First Name
Search
Composite Public Library
First Name Middle Name Last Name Grade Library

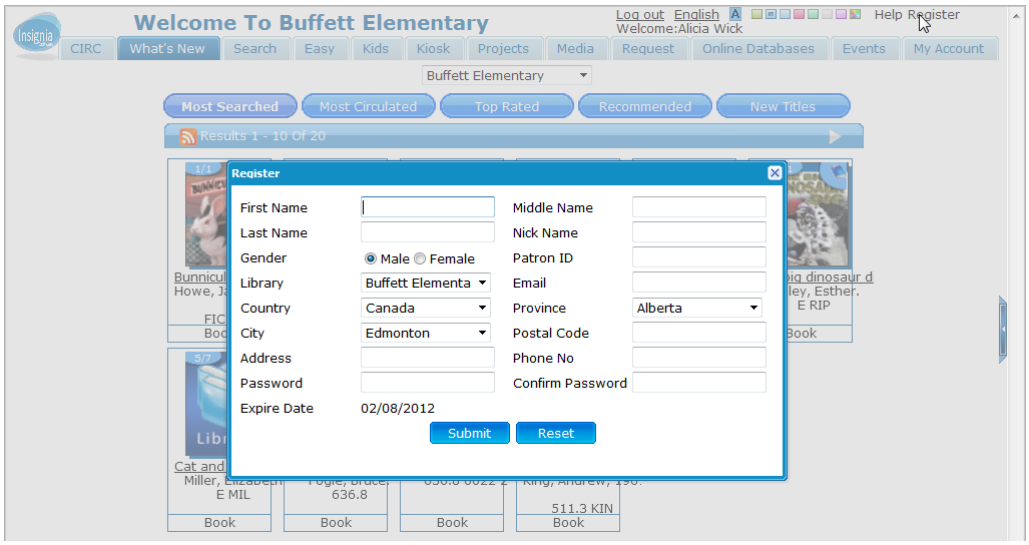
Request

1. Go to the library URL and click the My Account link.
    a. Enter login if prompted.
2. Click Networking tab.
3. Search for the patron in the search box at the top of the window.
4. Click request to the right of the friends name from the grid of results.
5. Accept a friend by clicking the accept tab and select the patron and click the accept button.
6. Group friends together into patron defined groups.

Register

The register feature in the OPAC allows a patron to sign up to the library for a library account. Library staff is alerted to new patrons registering upon login. At that time they can except the patron into the library and assign them a library card.

1. Go to the library URL.
2. Click the Register option in the top right.
3. Enter the required information.
4. Click Submit.



Help Menu

The Help menu can be accessed by clicking on the help feature at the top of the Web OPAC window. A window will open allowing you to browse the index, search for a feature, or view a table of contents. To select a help topic click the link to be taken to the help window you selected.

1. Go to the library URL.
2. Click the Help option in the top right.
3. Choose either the content, index, or search tab.
4. Search for or select a help topic.
5. When help is obtained, close window.

Insignia Smartphone Apps

Insignia currently offers two mobile applications that allow patrons to search the library 24/7 from anywhere with mobile network or internet service. These mobile applications exist for the Android and IPhone operating systems. Simply, search the App Store or Market for Insignia ILS and select the icon.

Insignia App Icon:

Features

Search

Patrons can search the library catalog using Keywords, Title, Author, or ISBN.

What's New

This feature provides readers advisory by offering patrons a list of the items they have recently viewed, recommended items from library staff, suggestions based on authors they have circulated, and a list of Most Circulated items.

My Account

Patrons can manage their library accounts. The user ID and password are the same as those used in the OPAC and can be set up in the patron profile in the ILS. From this feature patrons are able to place reserves and renew items.

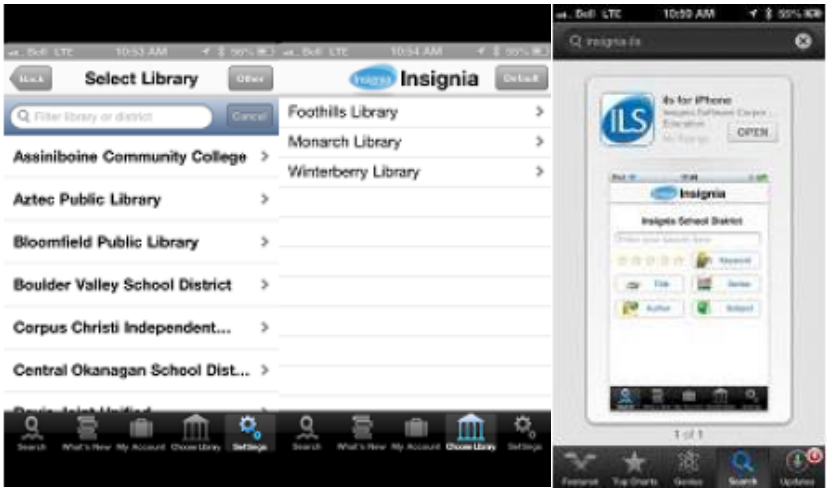
Setting up the App

If your district wants to request the free mobile phone app, check the version number of your ILS. If the version is 6.0 or greater, technical support will submit a request. Upon approval, a technical support representative will make contact when the app becomes available for the district. See the instructions to download the app in the following mobile operating systems.

IOS from Apple

1. **Find the app** for Insignia in App Store by searching “Insignia ILS”.
2. The app will appear with the following ILS logo:
3. **Install the app** by clicking on the item in the results list and selecting Install or Open for update, an app will show up as shown below.

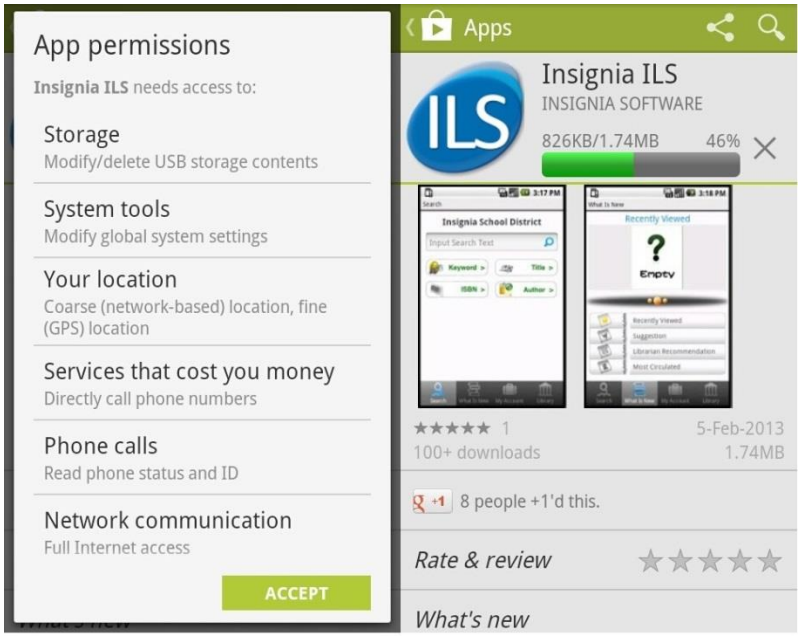
4. **Click Open** to open the app or click on the ILS icon.
5. **Select your library/district**:
   5.1. Your library/district can be searched by name in the prompt that shows when the app is opened for the first time..
   5.2. A default branch/school to search can be selected by going to Library clicking on Default and selecting the branch/school with a checkbox.



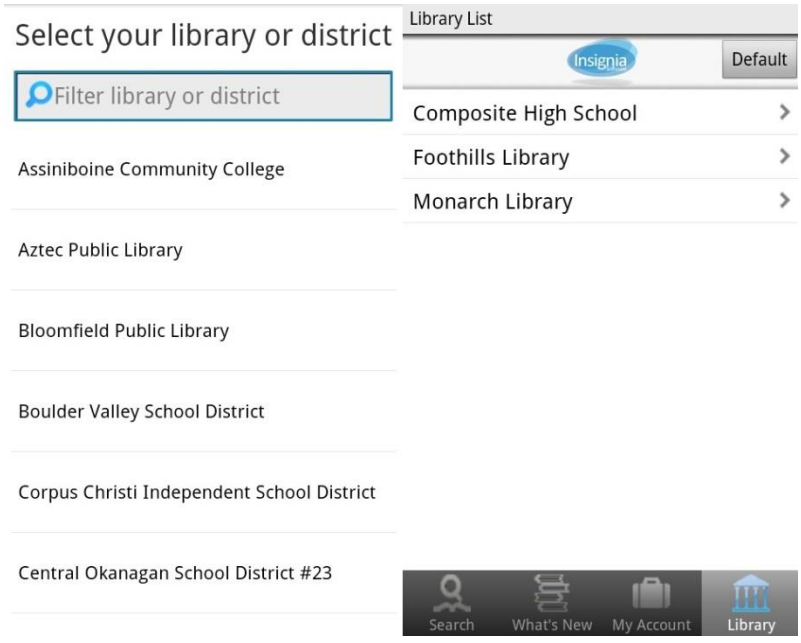
6. **Use the app** to search your library.
   6.1. After successfully completing the four steps above you will now be able to search for items in your library.
   6.2. For help on searching or to find out about additional features within the app you can go to the Help menu within the app under Setting and scroll down or contact Insignia Technical Support.

Android from Google

1. Search for Insignia ILS in Play Store.
2. Select the icon and click “Install”.
3. Accept the agreement to begin download.
4. Download application.

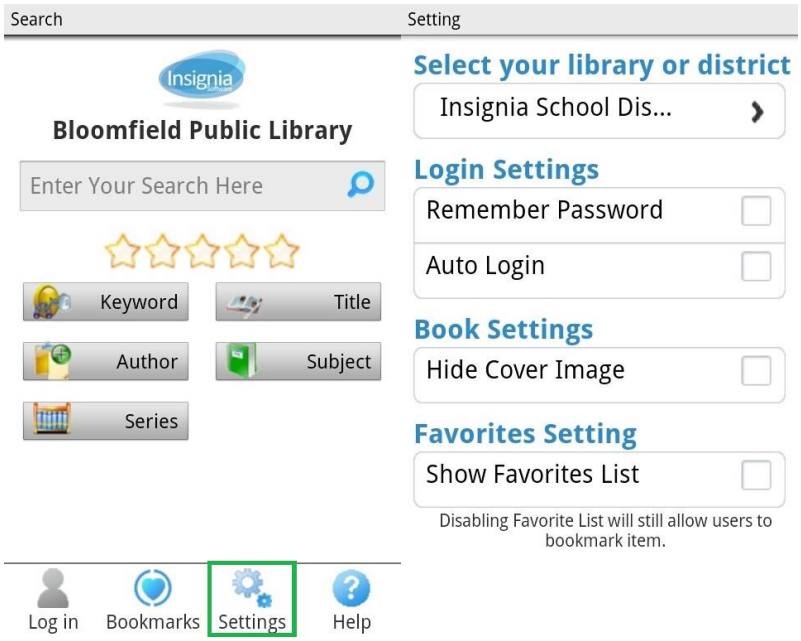


5. Select the district from the menu.
6. Select the library from the menu.



7. If you accidentally selected the wrong district, press the setting button on your phone.
8. A menu will appear on the bottom of the screen. Click “Settings”.

9. Select your library or district from the top menu.



Glossary

Ad hoc fine - a miscellaneous fine that can be applied to a specific category defined in Parameters under the category “Fine Type”.

Archived - records that are not available for use within Insignia but are still stored and retrievable

Authority Records - a separate index from bibliographic records that controls the headings used in the main catalog including a history of catalogers making decisions about those headings

Bindery - physically combining older issues of serials into one volume after a process of preparation and inspection

Circulation Type - indicates the loan period assigned to different groups of items and patrons.

Claimed Returned - a check out tab indicating books with outstanding fines that patrons say they have returned before the due date. It also records whether or not the book was found later.

Copy - the material available for check out with a barcode, price, and circulation loan period.

Electronic Data Interchange (EDI) - transferring data between different computer systems or computer networks

Global Changes - irreversibly changing data across the database to update and clean up records

Inter-Library Loan (ILL) - loans of materials from libraries outside the library district

Item - linked to the MARC bibliographic record which can belong to a local library or a union and allows fields such as title, author, call number, and subject headings to be modified for a number of copies within a library collection.

Lightweight Directory Access Protocol (LDAP) - access protocol for accessing and maintaining distributed directory information

Local - search for materials only from the local library site.

Kit - a diverse set of materials assigned to a copy available for check out which can include electronic media, games, and other interactive components.

MARC Code - made up of tags, subfields, values, and indicators to organize library records for searching

Power Search - a more detailed search interface compared to advanced and simple search that allows patrons to search in specialized advanced reading programs

Quick Catalog - incomplete records used to catalog quickly for new, in-demand items that will disappear when the record returns

Routing - a process of selecting where to send a serial issue to one or more patrons in a list

Serials - series of published work that arrives on a regular schedule

School Interoperability Framework (SIF) - open data sharing specification for Kindergarten to Grade 12 institutions that models educational data

Silverlight - development tool for web applications

Short Message Services (SMS) Carrier - carrier with capability to send plain text messages

Unarchive - taking records out of the archive queue and putting them back into a retrievable format

Union - search from all of the library branches from within the district

Web Online Public Access Catalog (OPAC) - online database of materials in a library collection that is available to patrons

Z39.50 - searching outside databases remotely who are sharing library records

Insignia Software Technical Support

Insignia Software technical support is available:
Online: http://www.insigniasoftware.com
Phone: 866-428-3997/780-428-3997 Option 2
Email: insigniasupport@insigniasoftware.com

User will need login id and password to access:
Online technical support
Knowledgebase
Feedback

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